



Is a Mutual Mission Review the Right Evaluation Process for your Nonprofit?

Research has shown that high performing boards of directors regularly reflect on their performance and that of their leadership and the Executive Director. A tendency in performance evaluation is to tap methods derived from employer-employee review processes. These can seem directive and punitive and if not handled well, can lead to creating distrust among board members, or with the Executive Director and Board. If the board is regularly reviewing progress towards achieving goals, there is no need to have a “review of performance” as much as there may be a need to evaluate how to change or innovate in areas that will help advance the nonprofit and its leadership forward.

What is a Mutual Mission Review?

A concept adapted from the Episcopal Churches’ [“Mutual Ministry Review”](#) which recognizes the leadership necessary to deliver mission is more than one person. This evaluative process reflects on progress being made towards achieving organizational and mission goals, while identifying areas for improvement of the leadership of the organization. It evaluates the Executive Director and the Board’s performance at the same time. This annual process is designed to be reflective and action-oriented, with areas of improvement outlined so all parties understand expectations going forward.

What conditions need to be in place for this type of process to work effectively?

For a mutual mission review to be successful, all participating parties should understand:

- The process used (forms, timeline, who administers, etc.) that is evaluative to identify areas for improvement.
- That trust and respect are the basis for the success.
- Clear goals/objectives from which to evaluate.
- Common method for which to evaluate those goals/objectives.
- Which of those goals/objectives have shared responsibility for attainment (for example a fundraising goal may be shared between the Executive Director and the Board as a whole)

How to get started

1. Confirm your board is ready. Hold a discussion with the Board and Executive Director on this process and whether the board is ready to adopt a mutual mission review process.
2. Understand what performance metrics matter. These are tied to the organization’s mission impact and financial sustainability goals, ideally codified in its strategic plan. Performance attainment of special projects may also be included to strengthen the capacity of the Board and the organization. DANA also recommends including professional development goals for the Executive Director and the Board for which evaluation is made.

3. Confirm the method to measure success is agreed upon, and the organization has the capacity to measure it. Setting goals or objectives with out a clear understanding of what “success” means, can lead to disagreements in the evaluation process. Having the right systems in place to measure is also important. Consider developing a rubric to define degrees of success.
4. Identify the right “instrument” to gather the feedback and document the results in writing. A board vote on accepting the executive’s evaluation and its own documents the board did complete the evaluation and approved its recommendations for improvement.
5. Determine who manages the process of evaluation and keep it consistent. Though the full board may be involved in evaluating itself and the Executive Director’s performance, “someone” needs to own the process to ensure it is administered annually and according to policy. Having a consistent process will help the board and the Executive Director reflect on progress over time. Shifting methods in evaluation year over year results in energy being spent on what the evaluation method is rather than the evaluation itself. The board may want an independent facilitator to collect the feedback, so board members and the Executive Director’s individual insights remain confidential.
6. Create a policy. A board policy on the process, frequency and who is evaluated will provide the consistency over time. It also gives clarity to those who are participating in the evaluation and those in the positions being evaluated to understand what they can expect.
7. Reflect and Improve. Once the first review is completed, take some time as a Board and with the Executive Director, discuss how the process worked, what could be improved.