

**CONFIDENTIAL TRUSTEE EVALUATION QUESTIONNAIRE**

Please rate your trustee colleagues 1 – 5, where:

5 = Strongly Agree    4 = Agree    3 = Unsure    2 = Disagree    1 = Strongly Disagree

After receiving Investment Reports, each Trustee:	Trustee A	Trustee B	Trustee C	Trustee D	Trustee E	Trustee F	Trustee G	Trustee H	Average
Has adequate time to read them									
Understands the content									
Appreciates omissions									
Can access an independent perspective									
Can ask questions in confidence									
Prepares questions									
Helps prepare advisor/manager meeting agenda									
Is aware of different comfort levels within group									
Has discussed additional support/training required									
Is properly prepared for investment meetings									
Challenges recommendations									
Probes for satisfactory answers									
Understands responses									
Is satisfied trustees controlled the meeting processes									
Is reassured after meetings									
<b>TOTAL (out of 75)</b>									

How did you rate your team’s ability to contribute to the investment process?

15-30 Very poor  
31-45 Poor

46-60 Satisfactory  
61-75 Competent