The Power of Trustee Engagement

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Engagement

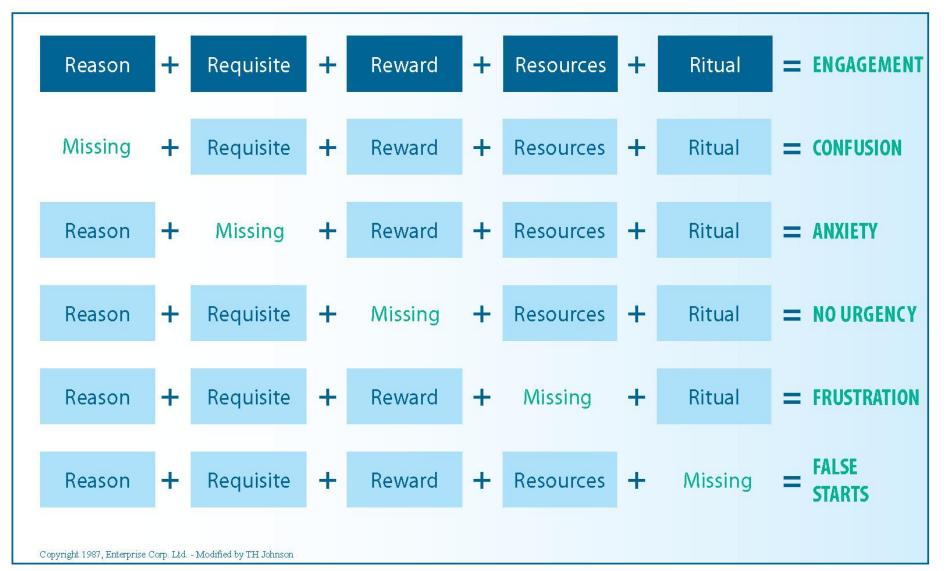
"The degree to which human energy is used to achieve a clearly defined set of goals."

Excerpted from "The Power of Full Engagement"
By Dr. Jim Loehr

Self Assessment

REASON: I am familiar with the values, purpose and responsibilities of the plan or system.	Strongly Agree	5	4	3	2	1	Strongly Disagree
REQUISITE: I have the capacity to carry-out the duties which apply.	Strongly Agree	5	4	3	2	1	Strongly Disagree
REWARD: I receive great satisfaction in exchange for outlay of my time and energy.	Strongly Agree	5	4	3	2	1	Strongly Disagree
RESOURCES: The advisors, managers and other professionals are in place to help me fulfill my fiduciary responsibility.	Strongly Agree	5	4	3	2	1	Strongly Disagree
RITUAL: I am involved in the execution and monitoring of the investment plans and policies.	Strongly Agree	5	4	3	2	1	Strongly Disagree

Consequences of Disengagement



Answer these 10 questions...

- Number of employees and retirees
- 2) Contribution rate
- 3) Final Pay Formula
- Requirement for full pension benefit
- Market Value of Assets

- 6) Funding ratio
- 7) Return Assumption
- 8) Asset Allocation Targets
- Number of investment managers
- 10) Names of consultants

"Find your reward (purpose), the force which moves you to action when nothing else can, the thing which continually renews your spirit, and you find a well-spring of abundant energy."

Excerpted from "The Power of Full Engagement"
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"... if your ritual (story) isn't working, then what do you tell yourself to justify it?"

Excerpted from "The Power of Story"
By Dr. Jim Loehr

Accomplishments

- ✓ Consultant Hires
- ✓ Increased Contribution Rate
- ✓ Targeted Brokerage
- ✓ Alternative Investment Strategy
- ✓ Emerging and Minority Manger Programs
- ✓ Public Pension Summit
- ✓ Pension Preservation Legislation

All driven by engaged Trustees!

Takeaway

Understand the Formula & Consequences
Self Assessment
"Requisite" Training
Find the "Reward"
Match the assignment
Support Positive "Rituals"

Engage your trustees and you won't be able to contain their energy to learn and act.