

2012 Joint Pension Board Retreat SUMMARY OF EVALUATION FORMS

	Joint Pension Board Member	Western Pension Administration	Guest
1. Tell Us Your role (# of Responses)	7	5	0
2. Was the retreat a good use of your time?	Avg 4.7	4.3	
3. Please rate the following sessions on their value relative to your role: (out of 5 pts)			
a) Retirement Plan Analysis	4.42	3.75	
b) Communicating the Goal of the Retirement Plan	4.57	4.2	
c) Global Small Cap Equities	4.00	3	
d) Commodities Investing	3.42	3	
e) UWOFA presentation	4.42	3.8	
4. What session did you find the most informative?	4 votes for UWOFA 3 votes for communications	3 votes for UWOFA 1 vote for income adequacy 1 vote for commodities	
5. What session did you find the least informative?	6 votes for commodities 1 vote for small cap	3 votes for commodities 1 votes for UWOFA	
6. How useful was the pre-reading material?	3.71	3	
7. How was the volume of the pre-reading material?	3	2	
8. Are you in favour of eliminating the "binder" and having all retreat materials/presentation provided electronically?	4 –NO (keep binder) 3- YES (lose binder)	3 – NO (keep binder) 2- YES (lose binder)	
9. What is the best idea that you heard during the retreat and that the Joint Pension Board should follow up on?	<ul style="list-style-type: none"> • More online info for members • Online reporting of rep ratio with personal assessment • Governance ideas from UWOFA • Member communications & rep ratio 	<ul style="list-style-type: none"> • Standardized reporting • Keep replacement ratios, but maybe not on annual stmnt • Provide tools/workshops earlier in career • More generic calculations • Having members from UWOSA on JPB to represent 'average' members 	
10. What can we do to improve the retreat?	<ul style="list-style-type: none"> • Have binder in advance • Good length (1/2 day) • Good venue 	<ul style="list-style-type: none"> • Less detailed stats; more conclusions and foster discussion around what the details mean • Provide pre-reading earlier 	
11. What can the pension staff do to improve the effectiveness of the JPB?		<ul style="list-style-type: none"> • Provide operational report to JPB: ex. Present trends on employee inquiries, projects, issues, milestones 	
12. Any other comments or ideas you would like to share?		<ul style="list-style-type: none"> • Good venue • Good length of time • Good variety 	

Conclusions:

- Venue, length of day and overall format is successful
- Needs of JPB and Pension Admin Staff may be different
- All valued a mix of topics and presenters
- Encourage discussion as part of sessions
- Provide materials earlier: pre-read 2 weeks in advance and binders at least 1 week in advance; provide a highlights or summary if there is a high volume of information
- Maintain "binders"; can provide option next year
- Consider printing slides for presentations 2/page