

# XYZ Committee Assessment

## 1. What is the biggest challenge facing the XYZ committee?

		Response total
		<b>4</b>

Statistics based on 4 respondents;

## 2. How do you define success in your respective committee over the next three to five years?

		Response total
		<b>4</b>

Statistics based on 4 respondents;

## 3. Please indicate the importance of the following items in examining the investment performance of the portfolio.

	Most important <span style="color: red;">■</span>	Least important <span style="color: yellow;">■</span>	Not important <span style="color: lightgreen;">■</span>	I have no preference <span style="color: lightblue;">■</span>		Response total
"Absolute" comparisons - comparing actual returns to an "absolute" percent return target	33.33% (1)	66.67% (2)	0% (0)	0% (0)		<b>3</b>
"Relative" comparisons - comparing actual returns to various market indices and/or other performance systems (S&P 500, Bloomberg Barclays US Aggregate Bond Index, etc.)	100% (3)	0% (0)	0% (0)	0% (0)		<b>3</b>
Using both "absolute" and "relative" measures	50% (2)	0% (0)	25% (1)	25% (1)		<b>4</b>
Comparing performance to similar organizations/peers	100% (3)	0% (0)	0% (0)	0% (0)		<b>3</b>

Statistics based on 4 respondents;





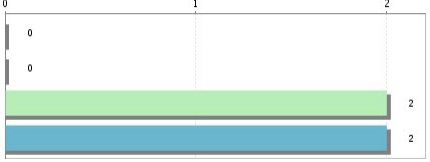
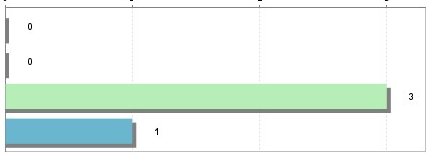
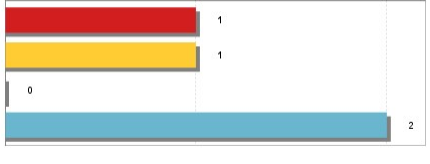
**4. What are the five most important components of an effective strategic partnership with your investment management provider? (Please indicate your top five 1-5)**

	1 	2 	3 	4 	5 		Response total
Experience working with organizations like ours	0% (0)	0% (0)	0% (0)	0% (0)	100% (1)		<b>1</b>
Breadth of investment offering (including alternatives)	0% (0)	0% (0)	100% (1)	0% (0)	0% (0)		<b>1</b>
Improved governance process	0% (0)	0% (0)	100% (1)	0% (0)	0% (0)		<b>1</b>
Risk management process	0% (0)	0% (0)	50% (1)	50% (1)	0% (0)		<b>2</b>
Ongoing committee education	0% (0)	0% (0)	0% (0)	100% (1)	0% (0)		<b>1</b>
Client service team and resources	0% (0)	100% (1)	0% (0)	0% (0)	0% (0)		<b>1</b>
Manager research and selection expertise	66.67% (2)	0% (0)	33.33% (1)	0% (0)	0% (0)		<b>3</b>
Asset allocation and advice process	50% (2)	50% (2)	0% (0)	0% (0)	0% (0)		<b>4</b>
Cost savings	0% (0)	0% (0)	0% (0)	100% (1)	0% (0)		<b>1</b>
Additional fiduciary oversight	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)		<b>0</b>
Proactive, nimble investment decision-making	0% (0)	33.33% (1)	0% (0)	33.33% (1)	33.33% (1)		<b>3</b>
Simplified operations/administration	0% (0)	0% (0)	0% (0)	0% (0)	100% (2)		<b>2</b>

Statistics based on 4 respondents;





**5. Please indicate your viewpoint on the role each of the asset classes below should have relative to your portfolio.**

	We should utilize active strategies for this asset class ■	We should utilize passive strategies for this asset class ■	This asset class should not be included in our portfolio ■	We would like additional education on this ■		Response total
U.S. Equity	75% (3)	25% (1)	0% (0)	0% (0)		<b>4</b>
Emerging Markets Equity	75% (3)	25% (1)	0% (0)	0% (0)		<b>4</b>
International Equity	75% (3)	25% (1)	0% (0)	0% (0)		<b>4</b>
Fixed Income	75% (3)	25% (1)	0% (0)	0% (0)		<b>4</b>
U.S. High Yield	75% (3)	25% (1)	0% (0)	0% (0)		<b>4</b>
Emerging Markets Debt	25% (1)	25% (1)	0% (0)	50% (2)		<b>4</b>
Low-Beta Equities	0% (0)	33.33% (1)	0% (0)	66.67% (2)		<b>3</b>
TIPS	0% (0)	25% (1)	25% (1)	50% (2)		<b>4</b>
Private Real Estate	0% (0)	25% (1)	50% (2)	25% (1)		<b>4</b>

	We should utilize active strategies for this asset class 	We should utilize passive strategies for this asset class 	This asset class should not be included in our portfolio 	We would like additional education on this 		Response total
Distressed/Oppportunistic Strategies	0% (0)	0% (0)	50% (2)	50% (2)		<b>4</b>
Global Private Assets	0% (0)	0% (0)	75% (3)	25% (1)		<b>4</b>
Hedge Funds	25% (1)	25% (1)	0% (0)	50% (2)		<b>4</b>

Statistics based on 4 respondents;

**6. Investment risk can be defined in many ways. Which of the following best describes your definition of risk? Check all that apply.**

		Response percent	Response total
The possibility of not meeting a planned spending objective		<b>25%</b>	<b>1</b>
The possibility of not achieving an established target rate of return		<b>100%</b>	<b>4</b>
Long-term erosion of the purchasing power of the portfolio		<b>100%</b>	<b>4</b>
Portfolio volatility (i.e. the total portfolio value fluctuating even if it is essentially in phase with general market fluctuations)		<b>25%</b>	<b>1</b>
Other:		<b>0%</b>	<b>0</b>



Statistics based on 4 respondents;

**7. Is there anything else you think we (SEI) should know about XYZ and/or your committee to better serve you as your investment provider?**

	Response total
	<b>2</b>

Statistics based on 2 respondents;

**8. Which of the following committees are you a member of?**

		Response percent	Response total
XYZ Foundation Committee		<b>50%</b>	<b>2</b>
XYZ Community Foundation Committee		<b>50%</b>	<b>2</b>

Statistics based on 4 respondents;

**Name (optional)**

	Response total
	<b>1</b>

Statistics based on 1 respondents;

**Email address (optional)**

		Response total
		<b>1</b>

Statistics based on **1** respondents;

Information provided by SEI Investments Management Corporation, a registered investment adviser and wholly owned subsidiary of SEI Investments Company.

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Investing involves risk including possible loss of principal. Investments in certain asset classes may involve additional risk. Alternative investments are subject to a complete loss of capital and are only appropriate for parties who can bear that risk and the illiquid nature of such investments. There can be no guarantee risk can be managed successfully.

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The S&P 500 and Bloomberg Barclays US Aggregate Bond Index are broad market indices of the equity and fixed income markets respectively. Indexes are unmanaged and one cannot invest directly in an index.

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Beta is a measure of the volatility—or systematic risk—of a security or portfolio compared to the market as a whole