

# How can we help you review your board's effectiveness?

We understand that every board is different and that's why we offer a build-your-own approach to assessing your effectiveness as a board. You can combine the different tools we have available in any combination to create a package that suits your scheme's needs and priorities.

We typically recommend the core offering as your starting point (a self-assessment and workshop discussion), with further tools added to gather wider perspectives or focus on specific areas. More details on the various options available are provided on page 2.

We also have wider services to offer which can support effective boards, including:

- Individual trustee or chair evaluations
- Trustee recruitment & selection support
- Adviser reviews and benchmarking your advisers
- Training on & support in reviewing Equity, Diversity & Inclusion (EDI) practices

We're happy to chat through all of the options with your scheme in mind, and provide more detail to help you build the most appropriate solution for your board.

## Contact the team

[boardeffectiveness@vidett.com](mailto:boardeffectiveness@vidett.com)

Find out more about how we help make boards more effective here: [vidett.com/our-services/board-effectiveness/](https://www.vidett.com/our-services/board-effectiveness/)



# Our 9 core tools

<b>Core offerings</b> We typically recommend all boards undertake option 1 & 2 as your core offerings.	<b>1 Trustee self-assessment survey</b> Get a clear insight into the way the trustee board operates across a broad range of areas key to ensuring effective decision making, including board structure, meeting effectiveness and risk management. All trustees complete this anonymous online survey based on their personal experience in their current role and the results are collated based on the collective views of the board as a whole.		<b>2 Discussion &amp; workshop</b> Discuss the key themes arising from the review in this interactive workshop, facilitated by one of our experts, and agree an action plan for any improvements. The board will benefit from the fresh insight on trusteeship, board effectiveness and best practice that somebody not involved in the day-to-day running of the scheme can bring.	
	self-reflection			
<b>Additional offerings</b> Other options to add on to obtain wider independent or scheme-specific perspectives.	<b>3 Independent meeting observation</b> Working with boards of trustees is our day job. Obtain independent feedback and recommendations on your meeting effectiveness, decision-making processes, key relationships and board dynamics by us observing you in action at a scheduled meeting.	<b>4 1-1 interviews with trustees or other key stakeholders</b> Help probe and address specific areas by giving individuals an opportunity to provide detailed, nuanced feedback openly and confidentially to our independent interviewers.	<b>5 Desktop review of policies/processes</b> In this more detailed look at the operational aspects of the trustee board, we'll review a sample of key scheme documents to independently assess the effectiveness of your decision making processes, internal controls and risk management capabilities and suggest improvements where relevant.	
	independent perspectives			
	<b>6 360° stakeholder feedback survey</b> Gather a broader 360° perspective from other stakeholders eg pensions manager, sponsor, advisers. This compliments our trustee self-assessment survey, and the results are overlayed to easily compare and benchmark the trustees' views against those of other stakeholders.	<b>7 Trustee knowledge &amp; understanding (TKU) survey</b> Identify any gaps in knowledge and understanding to help guide future training needs for individuals and the board through this online survey.	<b>8 Skills &amp; experience survey</b> Identify your top skills and key areas of experience as a board, as well as any gaps, to help support succession planning, recruitment and allocation of roles.	<b>9 Strengthscope® strengths-based assessments</b> Understand your individual and collective strengths, how these influence decision making, relationships and team dynamics and how to harness your individual strengths for the benefit of the whole trustee board. This assessment adds a new layer of insight to a board effectiveness review, keeping the exercise fresh and engaging for the trustees.
wider scheme-specific perspectives				

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