Trust but Verify

MANAGER SCORECARD

While a meeting schedule is typically agreed at the start of a relationship, the manager scorecard can be completed at any point during the relationship. The scorecard can help focus attention on areas of importance and objectives beyond short-term financial performance.

Manager Scorecard					
	Areas of importance and/ or objectives	Exceeds expectations	Meets expectations	Falls short of expectations	Comments
1	Investment performance vs. benchmark				
2	Other investment KPIs (e.g. drawdowns, turnover, style factors)				
3	Portfolio KPIs for client's responsibilities (e.g. net zero)				
4	Active engagement with portfolio companies				
5	Governance and proxy voting				
6	Reputational or organizational issues, surprises, personnel turnover				
7	DEI performance of the manager				
8	Client/manager relationship				
9	Operations (e.g. process efficiency, technology) and compliance				
10	Thought leadership and quality of research				
	Overall level of trust in the relationship				