# **What “Good” Leadership Looks Like Worksheet**

Every given leadership role has a seemingly endless list of work that a leader COULD do, so how do you know that what you ARE doing is the best and most efficient use of your time?

Take time to STOP, take stock of what you ARE doing and decide if you want to make any changes.

Use this framework to:

* Help broaden your thinking *and* narrow your focus at the same time.
* Guide conversations with your colleagues and mentors.
* Define “good” as “good enough” so you can take action to develop as a leader even when your “spare” time is limited.

The sample answers to the questions below were initially written for a Pool Director. Edit this document so that it is “right” for you at your level and experience in your pool. This could include removing some bullets, or even whole questions entirely. Once you have defined “good” for yourself, you can use it to be more intentional about how you spend your time.

See the [AGRiP webinars page](http://agrip.org/education/webinars) for the webinar that supports this worksheet.

## **What “Good” Looks Like Questions**

1. **What are you reading?**
	1. 2 periodicals twice a month about local government and risk management, to see if there are any articles of direct relevance for my members.
	2. Other pool newsletters to see what they’re doing and how they communicate with members (there are 2 newsletters I receive directly, and I see others that are summarized in AGRiP eNews).
	3. A weekly summary of proposed state legislation, in case there are changes that might impact the pool.
2. **What data are you monitoring?**
	1. Monthly large claim reports, monthly loss ratios (pool-wide) and my pool’s semi-annual actuarial analysis, to understand important loss trends.
	2. Monthly investment reports and financial market summaries from the pool’s investment manager, to anticipate possible impacts.
	3. Annual retention and year-over-year retention analyses produced by underwriting and their monthly update of “at risk” members.
3. **With whom are you building relationships?** (I am doing this for “my” sake.)
	1. The chair of my governing body so we have a good working relationship.
	2. Executives of 2 associations that endorse the pool (1 of them is new), so they can advocate for and support us.
	3. My 5 direct reports (1 of them is new), so we operate well as a team.
	4. The state risk manager because even though we are not regulated, it’s important they know who we are and how we operate.
	5. My pool’s contracted lobbyist, so they know our top priorities.
	6. The underwriters of our 3 reinsurance/excess partners (2 of them are new) so I can anticipate any changing needs or demands.
	7. Our reinsurance broker, so they can help position us well for renewal.
	8. 3 other pool directors who I met last year and who have similar members/coverages.
4. **From whom are you learning?**
	1. My predecessor, who is retired, but we meet for lunch once a month so I can bounce ideas off them.
	2. My underwriting manager, who has been part of the pool longer than me, to learn about the area of pooling with which I am least comfortable.
	3. The meeting facilitator we hired for this year’s staff retreat, who also is a DEI expert and helping us shape new policies.
	4. My pool’s technology director, who helps me better understand the cybersecurity issues my pool and our members face.
5. **Who are you directly/individually educating?** (I am doing this for “their” sake.)
	1. 2 of the people who directly report to me and need some additional guidance in their roles.
	2. Our pool’s data analyst, who is new and needs to appreciate the “why” behind the questions we are asking.
	3. My governing body, because we have some new reinsurance challenges for which they need to be prepared.
	4. Elected officials, because as part of our overall pool efforts, I am meeting monthly with the statewide association of mayors to bring forward important risk management issues.
	5. The finance director from another pool, with whom I’ve been paired as part of a mentoring program.
6. **What conferences are you attending?**
	1. My state’s annual PRIMA conference, as part of the booth we sponsor and to connect with the risk managers in our largest member entities.
	2. The annual meeting of the county association, where I make a presentation about our coverage and contribution changes, and other pool priorities.
	3. Our annual risk management conference and annual member meeting, where I act as host and also present the annual membership report.
	4. AGRiP’s CEO Institute, to connect with other pool executives.
	5. AGRiP’s Governance Conference or Staff Forum, when topics align with those in which my pool is interested, or I have governing body members who want to attend.
7. **What are you writing/presenting?**
	1. A presentation about our police liability losses that I’ve been asked to give at AGRiP’s Staff Forum.
	2. My monthly article in our pool newsletter, which will be focused this time on why we’re requiring cyber risk assessments for coverage renewals.
	3. The FY2023 proposed budget and associated materials for my upcoming Board meeting (working on this together with my finance director).
	4. Performance reviews for my direct reports.
	5. An email to all staff about our new hybrid work policies (working on this together with the HR services manager).
8. **What indications do you have that your relationship with your governing body is healthy enough? Useful enough?**
	1. If my board members have a question about something, they call and ask me. (I’m not usually surprised by questions that come up during a Board meeting.)
	2. I have an informal lunch with each board member at least once a year and feel that I know them well as individuals.
	3. I can usually anticipate which of my governing body members is going to have a problem with any recommendation being made.
	4. My board conducts an annual review of my performance.
	5. I can call several of my board members informally to bounce ideas off of them.
9. **What indications do you have that you are a good leader for your pool?**
	1. Our pool is financially stable and has a strong net position.
	2. We have a succession plan in place for when I retire in 4 years.
	3. Turnover among staff has been pretty low in the last decade (it’s been more lately, but that’s not unique to us).
	4. The governing body asks good questions about the recommendations we give (they don’t just rubber stamp the staff recommendation).
	5. My staff team gives most of the reports and recommendations at our board meetings.
	6. I can take a 2-week vacation without worrying too much about what will happen.
	7. Our staff generally makes good decisions that put our members first.
	8. Most of our staff and the Board can repeat our pool mission and “why” statement with good accuracy.
10. **What are you doing to support “trend spotting” for your pool?**
	1. I pay attention to what other pools are doing, or issues they face, so I can be on the lookout in my pool.
	2. I go to non-pool meetings where my members gather and I listen to issues they talk about or that are important to them.
	3. I follow a lot of pool and association contacts on Twitter and LinkedIn, and I look at those platforms a couple of times a week.
	4. I ask my teenagers what they’ve been watching on Tik Tok, and I sometimes watch reels they find funny.
	5. Once a month, our management team meeting is focused on “trends to watch.”
	6. We’ve been doing in-service training for our Board about “generative governance,” and we’ve added an agenda item for open discussion at each meeting.
	7. With all the items I listed in my reading and data monitoring answers, I try to either find questions I can ask to learn more or interesting information I can pass along to my team.
11. **How do you know your strategic plan is clear and useful to your stakeholders?**
	1. We have a visual/graphic representation of the strategic plan that hangs in our main conference room.
	2. We tie every board agenda item back to the strategic plan and identify how it supports the pool’s strategy.
	3. Our annual report to the membership is also tied directly to our strategic plan goals.
	4. The main goals from our strategic plan are on our website. In each newsletter we feature something related to the plan.
	5. As part of our strategic planning process (every 3 years) we do a member survey to gather input about what we could be doing better.
12. **What other questions would help determine your “Good”?**
	1. How am I keeping myself balanced between personal and professional time? (Do I get enough time away from work? Do I get enough exercise and sleep?)
	2. Am I delegating the right work and enough of it?
	3. Am I giving people enough of a challenge to keep them interested?
	4. If I were gone unexpectedly for 3 months, what would fall through the cracks?
	5. Is there anything I don’t feel comfortable telling my Board or my direct reports?