

**APHL
Lab Director Transitions Guide
Online Toolkit**

**[Headline]
Lab Director Progress Report**

For the lab: How to monitor director development

For use by the lab director’s mentor, manager or supervisor, this progress report helps those above the lab director evaluate the director’s progress. APHL recommends having a mentor in place for the lab director from day one—preferably within the lab—who can help guide the director through onboarding and beyond. This progress report serves as a monitoring tool to document development at intervals throughout the first year. Complete this report during in-person sessions with your director.

Employee information	
Name: _____	Mentor: _____
Position: ___Lab Director_____	Manager: _____
First day	
<input type="checkbox"/> New employee package given to new employee; Date completed: __/__/__. <input type="checkbox"/> New employee package completed by new employee; Date completed: __/__/__. <input type="checkbox"/> Mentor assigned; Name: _____ <input type="checkbox"/> Orientation completed (Use new employee orientation checklist.)	
One-week check-in with mentor	
<input type="checkbox"/> Discuss mentoring roles and mentoring plan <input type="checkbox"/> Go over orientation checklist <input type="checkbox"/> Go through self-study checklist <input type="checkbox"/> Go through packet checklist <input type="checkbox"/> Discuss check-in timeline/procedure <input type="checkbox"/> Other (specify) _____ _____ _____	
Review training items with supervisor/manager	
<input type="checkbox"/> SOPs <input type="checkbox"/> Regulatory documents <input type="checkbox"/> Competency list	
Two-week check-in with mentor	
<input type="checkbox"/> Review orientation checklist <input type="checkbox"/> Review self-study checklist	

- Review packet checklist
 - Discuss any updates/changes to check-in procedure
 - Other (specify) _____
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One-month check-in with mentor

- Review professional organization form
 - Complete self-evaluation form
 - Complete training forms
 - Discuss any updates/changes to check-in procedure
 - Review competency test results
 - Other (Specify) _____
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Develop individual workplan with mentor

- Performance metrics
- Core competency list

Six-month check-in with mentor

- Complete individual workplan
 - Complete self-evaluation form
 - Complete training forms
 - Review test results
 - Discuss any updates/changes to check-in procedure
 - Other (specify) _____
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Six-month performance review

- Conduct six-month performance review
 - Devise individual workplan
 - Address reward and recognition system
 - Review continuing education and certification documents
 - Review progress reports
 - Apply for internal committees
 - Take six-month job satisfaction survey
 - Other (specify) _____
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One-year performance review

- Take one-year job satisfaction survey
- Take career assessment
- Apply for committees external to agency

Conduct one-year performance review

Complete formal mentor/mentee program

Other (specify) _____
