

# IN TRANSITION:

A practical guide to navigating  
leadership changes in the  
public health laboratory



**APHL** ASSOCIATION OF  
PUBLIC HEALTH LABORATORIES®

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## March 2013

*APHL is a national nonprofit dedicated to working with its members to strengthen governmental laboratories with a public health mandate. By promoting effective programs and public policy, APHL strives to provide public health laboratories with the resources and infrastructure needed to protect the health of U.S. residents and to prevent and control disease globally.*

# Acknowledgments

This guide was created through a panel discussion, brainstorming and interviews with subject matter experts and others whom laboratory directors rely on to help fulfill their everyday duties and realize the shared long-range vision for public health. APHL wishes to thank those in member services, communications, governance and our other programs for communicating their experiences and assistance to this book—and for the practical help they offer whenever a member calls.

A special thanks to our Emerging Leaders Alumni community, whose hard work and dedication to the field made much of the online guide possible.

This publication was supported by Cooperative Agreement #U60HM000803 from CDC and/or Assistant Secretary for Preparedness and Response. Its contents are solely the responsibility of the authors and do not necessarily represent the official views of CDC and/or Assistant Secretary for Preparedness and Response. This report was 100% funded by federal funds, from the APHL-CDC Partnership for Quality Laboratory Practice cooperative agreement. The total amount of funding received for the cooperative agreement is \$28,010,529.

# I. Letter from the Executive Director

Public health laboratory directors are on the move. Whether they're retiring, moving or leaving for reasons of their own, they're leaving many open positions behind. And these spots are taking some time to fill.

Lab directors are critical leaders in today's health system. Not only do they help their own labs run smoothly and efficiently, they keep a critical eye on the future of public health in our nation. But the current group of lab directors is aging out. As of this writing, there are about a dozen positions open around the country. It's not only the number of open positions that causes concern, but the new challenges in public health as well. In a relatively short space of time before this publication was issued, labs faced a novel influenza pandemic, hazardous events and large-scale foodborne illness outbreaks—and funding is perennially difficult. We need top-quality leaders who can come in quickly, manage change efficiently and innovate with purpose: Public health laboratories can't afford any downtime.

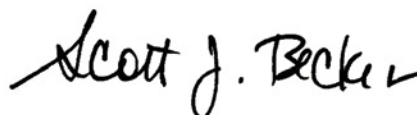
For more than 50 years, APHL has supported health labs and their leadership. Lab directors who have used APHL throughout their careers have transitioned to their own leadership roles—and we support them in different ways. We serve as a networking hub through our annual meetings and other gatherings and as a valued resource with our continued education, member assistance and electronic tools.

The transfer from one lab director to the next is a decisive period directly affecting the success of the lab. It sets the tone for the future not only in

the lab's quality but for health in the state. With lab centralization and the way we in the public health community circulate resources and ideas, a transition actually affects us all. You could say that if one lab director sneezes, the rest of us might get a virus. APHL's charge is to keep the system healthy—and this guide to facilitating transitions is one part of that.

We've created a one-stop place where all lab directors, lab leadership and those concerned with the position can obtain a concise collection of the best thinking from those who have been there. In the following pages, you'll find collected wisdom from the experts. Use this practical guide of best practices, actionable lists, real-life advice and lessons learned at any stage of the transition process, from preparation through to onboarding your new director. Supplementing this book is an online toolkit, filled with resources, templates and checklists you can download, adapt and use at your own labs.

We hope these tools and tips will prove useful in your transitions. And I personally want to extend the offer of help: APHL is ready to listen and respond to your changing needs. Please feel free to continue to reach out to us with your questions and ideas.



Scott J. Becker, MS  
Executive Director, APHL

Find the **APHL Lab Director Transitions Toolkit** and other **APHL Member Services** resources on our website at **[www.aphl.org](http://www.aphl.org)**.

## II. Understanding the Challenge

Throughout the entire organization, the staff members in a lab typically understand and respect the importance of their director's responsibilities. The director sets the tone for how the lab works and sets an example for following processes and technical and administrative procedures.

### A role where quality matters

Like any command-and-control structure, the director is the boss to whom staff reports; what the director says goes. After all, under CLIA regulations and state law, the director is responsible for all test results and surveillance data. What's not always appreciated or articulated is the larger scope of the director position, much of which occurs outside of the lab. Directors aren't acting scientists or lab workers (and if they were at one point in their career, they aren't once they take on the new role). A big chunk of their work is external: the bridge-building on the outside that allows the lab to function on the inside. "They are creating a space to allow the lab to do its work," one leader says.

Mid-level staff members aren't the only ones who can miss this bigger picture. The leadership surrounding the director position isn't always fully aware of the position's responsibilities. "In general, I don't think state health directors or officials themselves really understand all that's involved," one leader says.

### Nuances depend on structure

Not only is the director's role complex, it varies from state to state and lab to lab. Surrounding organizations affect the lab's role. Reporting structures vary. The director must consider not only where the lab stands within the state hierarchy, but also where the director role fits within the structure of the health department.

Depending on the lab's positioning, a director could be interacting directly or indirectly with those in leadership positions at a university, state health agency or environmental agency; state legislators and staff; governors' offices; community representatives and more. Good

personal, communication and management skills are just some of what's needed in these collaborative environments. And surrounding leadership will interact differently with the lab director depending on where the director fits into the bigger picture.

In addition, those doing the hiring—often state health officers, senior deputies or other state officials—probably have not dealt with the intricacies and requirements of this position on a daily basis. Certifications and CLIA requirements, in particular, can be tricky to those unfamiliar with them. Lab leaders advise that before those hiring get too far down the line with the search—and definitely before advertising—they get a firm grasp of the state and CLIA requirements in the job.

### The challenge at hand

Putting effort today into understanding the complex, multilayered role of the current lab director will help in filling that role if it's empty tomorrow. It will also make it clear that the replacement search takes time and care.

Even when the big picture is fully apparent, there may be a challenge in selling the importance of not only the position but the transition itself. Everyone at all levels within and around the lab must appreciate that the ease of the transition and quality of the next lab director will directly affect the quality of the lab—and quality is the *sine qua non* of any lab. From recruitment to interim direction to onboarding, every stage of the transition process needs adequate support.

The challenge of filling the director position is compounded by a dwindling pool of qualified candidates. With clinical lab programs ending and the existing educated cohort aging and retiring, finding a quality director that fits the bill is more challenging than ever.

# III. Preparation and Readiness

As with most lab activities, a leadership transition doesn't have a hard start date, and it's never really over—lab leaders are always looking ahead to the next change. Preparedness at each step keeps the transition manageable.

## *Lab leadership and supervisors:*

### **When you hear the lab director is leaving**

Frankly, leadership and staff members' first concern isn't keeping the transition process smooth; their preoccupation is their jobs and any effects change will have upon them. This goes for the scientists all the way up through senior management. If a departure is sudden, its effects and staff reaction could be traumatic.

In addition to communicating the changes outside the organization, you'll also have to prepare to talk about the changes at the lab. It could take a while to find the right person for the job. So you'll need to reassure and encourage staff to keep the day-to-day operations moving in the interim. In general, not a lot will change until a new director is hired—even if an interim director is appointed.

You can frontload some tasks. Prepare a director position description; leadership and the current lab director can weigh in on duties and responsibilities of the job. You can also begin thinking about the qualities desired in your next director and familiarizing yourself with the salary and compensation associated with the position.

### **Before the lab director leaves**

Regardless of how long a lab director has been in a position, capturing institutional knowledge before the departure is critical. From tactics for dealing with sticky situations to interacting with state legislatures, there will be insights only a director can offer.

A departure typically happens in one of two ways. The first type is self-motivated: A lab director makes the move, gives advance notice and can help to some extent during the transition. The second type is driven by an organization or some outside force: A lab director becomes ill, leaves or retires suddenly, or is asked to leave. In this case, the senior team won't likely have access to the former director during the transition. Keep in mind these are opposite ends of a spectrum, with many situations falling between the two. In either case, the goal is capturing institutional knowledge and getting it documented.

Reporting structures and lab supervision can change over the years within states, so continually tracking institutional knowledge from person to person will help the lab continue to move forward.

## *Current lab directors:*

### **Leaving your lab in good shape**

#### **Start early**

Creating a succession plan is something a lab director can do years out. Who's your ideal successor? Technical expertise is great, but what about the ability to manage others? Having someone else ready and trained versus passing on a set of documents is preferential—but most labs don't have this advantage of an in-house takeover. This is where a physical succession plan comes into play. What documents, contacts, lessons learned or other advice will a successor need? How else can you help assure continuity?

#### **Help to find a replacement**

Chances are you've built a network while you've been director. Recommend to lab leadership some places to look or job candidates you suggest.

Stay connected with the new lab director as long as you see fit and it's appropriate. You're the best resource. At the very least, give them a way to reach you if they need advice or have questions at particular times. Remind them, though, that learning is doing.

#### **Establish a mentoring program**

One lab paired up new directors with veterans. This can be done within the lab at any time, even before a planned transition. Who has the credentials—and qualities—to be the next in line? In some cases, that's the assistant director. The passing of institutional knowledge could take many forms, from a monthly meet-up to more in-the-trenches shadowing.

**“It was OK for me to step away because I was comfortable leaving the institutional knowledge in the hands of my assistant director,” one leader says.**

Mentoring can also be done outside the lab. Tap a more veteran director if you need help along the way. Work with APHL to help get access to the network, and check the [Lab Director Transitions Toolkit](#) for tips on mentoring.

## *Lab department managers:*

### **Managing well through a director transition**

When a director leaves, times can be tough. Morale may be down. Especially in abrupt or traumatic departures, staff members can feel as if their security blanket has been taken away, one leader explains. It's important to consider the transition's effects on all members of staff.

“When it comes down to it, dealing with a transition is like change management in any organization,” one leader explains. Don't keep it a secret. Recognize there will be a new director, and keep the lines of communication open with all staff. Encourage the entire team to keep an open mind about a new personality coming in, likely with different principles and perspectives.

## IV. Recruitment Guide for Supervisors

Those responsible for hiring a new lab director don't typically get a chance to practice that skill too often—and that's a good thing. There may be uncertainty about the process itself, and finding the best possible lab director will take time. Be sure that others realize the importance of the role and the difficulty of filling it well, so that you'll get the time you need.

### SECTION 1: HOW TO LOOK

First, define what the lab needs: Should the director have particular expertise, passions or skills; should they be a strong manager or communicator, an engaged leader or a firm one, an insider or new blood? Should they have an entrepreneurial or researcher mindset? How should they compare with your previous director? What are strengths and weaknesses in the lab that a director could help with?

No one candidate will be perfect in every way, but knowing your end goal will help narrow things down once evaluation time comes.

#### Selling the position—and the lab

The quality of the recruitment process must reflect the value of the lab director to your lab. You are not simply posting a position, you are selling it. View the post as an advertisement. Not only are you seeking out the best candidates possible, you are showing candidates what your lab has to offer and why they should seek out a position with you.

Senior lab leadership, state health officials and whoever else is involved in hiring must promote the position. And salary must also be in line with the position's importance.

#### The advertisement: What to include

Finding your ideal candidate begins with crafting an accurate, inclusive and attractive job description. Make your job advertisement appealing. Consider using your communications department or other staff member skilled at writing to craft the description—or at least to give it a good edit.

Another thing to do is *sell the lab* to candidates. How? Many states have opened new labs in the past decade, which could be enticing to a new lab director. Your location might also be an advantageous sell point for potential candidates.

When to bring in salary issues is a difficult question, but the organization must have a number or range in mind from the start. Some leaders say to advertise a set salary range early, while others suggest waiting to state it until the first or second interview, along with any particular details surrounding it. Either way, the salary is typically not negotiated until after an offer.

Do your research to know the correct salary and compensation associated with the position. Take into account the position's specific roles, required education, field of study, your geographic region and more as you create the salary range: The right one will do wonders in making the job appealing for the candidate you want.

Find sample recruitment materials and advertisements in **APHL's** online [Lab Director Transitions Toolkit](#), including compensation data and tools.

### SECTION 2: WHERE TO LOOK

Begin your search through word of mouth. Ask your existing or former lab director if they have suggestions as to potential candidates or places to look. Cultivate any networks you may have, online and off.

#### Search broadly now, narrow down later

Hiring from within preserves continuity and predictability. But often, people within the labs don't have the right qualifications, so you'll have to cast a wider net. Try pulling from clinical labs, academia and hospitals, at least in this initial stage. People from outside the network might provide strengths the lab will need, beyond the obvious, as its functions change in the future, such as business or entrepreneurial skills, grant writing or community outreach skills.



“For every time someone’s **moved up from within**, I can give you more than one case where they **hired** from the outside,” one leader says.

### The advertisement: Where to post

To save money and time, target your ad placement: Consider which publications, email lists or media outlets your ideal candidate would read.

Regardless of specific lab needs, you’ll want a candidate who gets the big picture of public health in the nation. APHL’s Job Center and Member Resource Center therefore are great places to start. APHL maintains a valuable network of public health leadership professionals, and it publicizes open lab director positions through email lists and e-newsletters.

If a savvy scientist is important to you, try the Career Connections section of the American Society for Microbiology. Or if familiarity with a university reporting structure is more important, add academic directories to your list. If you’re looking for diverse skills, try posting in a variety of outlets.

Remember, also, that people will talk about ads, discussing them with colleagues and regarding them as indicators of movement in the state or lab. A recruitment effort is an unofficial marketing and PR campaign; take care with it, and you can keep the buzz positive and helpful.

Use **APHL’s** recruitment resources and tools, including model job descriptions, advice on where to cast your net and more. **Contact the Workforce/ Professional Development program** through Member Services for additional tips, tricks and guidance to make your recruitment process easier.

### Other places to post:

- APHL’s Job Center and E-Update, our weekly national e-newsletter (contact Member Services) and member-only Listservs®
- Local newspapers and community websites
- University publications or email lists
- Chemistry journals
- *The American Journal of Public Health*
- Executive want ads in national publications (e.g., *The New York Times* or *The Washington Post*)
- Agency social media channels

## SECTION 3: WHAT TO LOOK FOR

In addition to the required certifications and qualifications, a lab director candidate needs to show other key capabilities and qualities. Some of these can be determined by looking at educational certifications or credentials; others by past experience; and others fall into the realm of management and administration.

### Your candidate on paper

The need for a doctorate in a related field is the first bottleneck. Often, individuals who might be well-qualified otherwise—say, with experience in a state laboratory or those being considered for other leadership positions—lack a doctorate, and so they’re unable to advance. It’s worthwhile to check present leadership possibilities within your lab and to make it easier for emerging leaders to pursue a doctorate.

Finding candidates with board certification in specific areas as well as a doctorate is, as a former director puts it, “a tricky combo.”

Candidates must meet CLIA certification requirements (APHL offers help wading through the CLIA language and website). A common problem is that candidates see the list of basic qualifications and apply, then later find out they need CLIA certifications. Using the right wording in recruitment that will translate across human resource systems can help eliminate this time-waster.

Up to half the labs in the country have an environmental component, so a candidate might need to have a good grasp on environmental health as much as general public health. Other areas where experience and understanding are major assets: working with the government, handling hazardous materials, performing agricultural testing and working in medical device policy.

Lab leaders say experience by and large trumps education. Human resources departments might be inclined to substitute education for experience when screening candidates—lab leaders say to watch out for this. Academic knowledge of hazardous materials management is an excellent asset, but experience in preparedness or having handled a similar crisis in the past is more valuable.

**APHL's Emerging Leaders Program can help you find existing leaders in the field. The program supports members with training and growth opportunities to help them lead their public health lab community.**

### Your candidate in reality

Increasingly, public health labs are looking for qualities in a director that would be important in top leadership in any other industry or agency. However, there will always be a few things that set a public health laboratory director apart.

Chief here is a full understanding of the public health mission. With potential directors coming from talent streams outside the lab, a grasp of the big picture, a true grounding in surveillance

and the ability to communicate public health risks can't be taken for granted. In other types of labs, quick test turnaround time or attracting top researchers might be the priority; but for public health laboratories, it's about performing the core functions to support public health.

Every candidate—and even your hire—might not have every quality you're seeking. Determine the deal-breakers based on the knowledge of your lab's strengths and its strategic plan. (If the lab doesn't have a strategic plan, your top priority might be a candidate with demonstrated excellence in making and achieving goals.) For instance, does the plan involve expansion? If so, you may need a director with proven abilities in forming partnerships or in community outreach.

Often, qualities can be cultivated over time. Other staff with particular expertise or understanding can fill in gaps, and APHL and its training programs can help, as well. As you're researching candidates, keep in mind these following qualities, ones that those in the field have found to be the most important for directors today and into the future:

**Capable of creating a vision and mission for the laboratory.** This also extends to the ability to be a visionary, to stick to an existing vision and mission, and to understand how one's own role fits into the overall mission of public health.

**Flexible.** State and local public health structures are vulnerable to change. A director who isn't flummoxed by change can set the tone for a laboratory to nimbly adjust its structure under new administrations, budget changes or shifts in departmental demands.

**A public face.** Often, it's a government representative who talks to the media—but the lab director needs to be able to take that role when needed. And being “the face of the lab” can also mean standing in the background. A director should understand the importance of communications, particularly crisis communication—and APHL and other professional associations can help with this. He or she should also have a sense for staying on message, providing clarity to those

in government communicating public health messages, and dealing with the public health impact brought by changes in journalism and social media.

**Approachable.** Is your candidate a walk-the-halls leader or a closed-office-door type? The former will have more success, lab leaders say. The command-and-control structure of the laboratory is necessarily rigid. As one leader puts it, staff members see the director as a “Really Big Boss.” Cultivating the kinds of relationships that result in good outcomes—creative solutions, alerts to difficult or dangerous situations, career mobility, ability to respond to change—is tougher in a highly structured environment, but it can be done if the director demonstrates an open mind.

**Confident, with ability to delegate.** This simply means that at the director level, a preoccupation with detailed scientific knowledge and practice is not nearly as important as a grasp of the big picture. Lab directors have to be comfortable with the scientists and technicians doing the specific, practical work while the director handles overarching concerns. Though the director should be confident despite not knowing every detail, he or she is also responsible for everything the lab does. Other capacities, such as the ability to keep communication open and to find and promote the best people, are what make this balance possible.

**Future-facing.** A good candidate should be excited about and involved in what’s ahead in public health: laboratory science, technology, equipment, research, funding sources, partnerships—pertaining always to what’s workable within the system. This enthusiasm encourages greater quality and teamwork within the lab.

## SECTION 4: HOW SUPERVISORS CAN EVALUATE CANDIDATES

A true evaluation doesn’t happen until the interview phase, lab leaders say. Because this phase can be time-consuming, narrow down your candidates as much as possible beforehand. Here are the top things to keep in mind during the interview phase:

**Gauge their management style.** Ask about challenging and stressful situations. How did they respond and conduct themselves? What was the final outcome? Give them a scenario (try a sticky political or policy issue), and then ask how they would communicate with staff or department leadership in that circumstance.

**What’s their concept of leadership?** Have they already transitioned from practice to leadership? You want someone who’s already comfortable with less scientific practice, more leadership. Your next leader should truly care about the lab and want to connect with its people.

**Ask forward-looking questions.** Your candidate should have a larger view of public health and be able to articulate that vision. Ask what they see as the future for your institution or for public health labs in general. You want to know not just how they respond to situations, but how strategically they’re thinking about the big picture.

**Discuss the role of public health.** You’re also making sure he or she understands the role of public health labs in the country. As one leader puts it: “You can get candidates with really good technical skills, but they might not do well in the job because they didn’t realize the extent of bridge-building involved.”

The candidates you pick will likely not have every single quality you want. Test for receptivity to building further skills on the job.

Tap **APHL** for guidance and resources! We have excellent evaluation resources including **top interview questions** to ask in the assessment phase. **APHL** can also be contracted to assist the agency and lab in the search and screening process.

## V. Shaping Surrounding Leadership

No matter how experienced, no new lab director is going to step into the position knowing everything about his or her role. Labs in different states function differently—usually for good reasons. Surrounding staff, assistants, deputies and officials within and outside of the lab can make or break a transition process. They have an interest in making a transition go smoothly—and supporting the change process will result in better, uninterrupted services and savings in money and time. Viewing change as an opportunity enhances every kind of transition process. Whatever your position, ask: What would you like to change about the lab? Then work with the new director to make it possible.

### What deputies and assistants need to know

**No. 1:** Keep the lines of communication open. Once the new director comes on board, be prepared to lend a hand. Create a leadership team of key senior management that meets often to keep on the same page.

Work with the new lab director to build the remaining skills needed to run that specific lab. Staff may expect the new director to have expertise in the same areas as the outgoing director, but this isn't always the case. You may have to help staff understand this. Perhaps a new director isn't as familiar with working in environmental health or with first responders; maybe they aren't experts in food safety or grant writing. Help them identify their knowledge gaps early and get them to the sources that will help fill them. This includes helping to familiarize them with which core functions your lab directly and indirectly provides.

Be open with your new director and pass along your institutional knowledge. When leadership teams up and communicates well, you'll prevent any education gaps from creeping into the process. And the door swings both ways: The new director may have areas of expertise, contacts or skills that others on staff can learn from, as well.

How will you **bridge the gaps? APHL** has resources to fill in knowledge gaps in core functions and other program areas. You can also try tapping other directors at nearby labs or the former director if available and if it's appropriate.

### Managing the change internally

This is the back end of change management. To make sure of staff members' understanding and to help keep morale high, senior management must keep the lines of communication open both actively and reactively.

Show support for the new director, listen to staff concerns with respect, and make things as transparent as possible. Hold face-to-face meetings to fill staff in on progress.

### Communicating the change externally

All in all, lab directors should spend much of their first months to full first year focusing on communication, and senior management should help them do that. Which outside leaders should directors be meeting with? The state health official (SHO), department senior deputy and anyone the director directly reports to are good places to start. Both supervisors and the new director can ask the lab or health department communications person what else will make this transition more effective and efficient.

New directors should consider meeting:

- The state health official
- The public information officer
- Directors of programs that utilize lab services
- Legislative liaison
- Communications departments or media liaisons from the state health department, governor's office and academic centers or hospitals with whom the lab collaborates

Communication will undoubtedly extend to the outside lab network and general public. What will those outside the lab need to know

about your director transition? How should you phrase it? These are questions that should be addressed before any media contact. And before anyone speaks to representatives, consult your

public information officer. In an administration sensitive to the media, unauthorized press communication should not occur. And people don't readily forget a poor public performance.

## How can the state and local health officials and senior deputy help?

As the main liaison between the lab and the state, the **SHO** and the senior deputy need to update the new lab director about integral state processes. Here are some more to-do items for the **SHO**:

- Begin to build a **relationship** with the lab director—you'll be a team in critical situations.
- Understand each other's **importance** to the public health mission.
- Set up ways to share program results—this will net **stronger** buy-in.
- Get thinking **early** about ways to enhance programs, support and communications.
- **Share** ideas you have for improvements in processes, and meet often on future public health issues.
- Get the lab director and program directors **communicating**—program staff can become advocates for the lab.
- Express your **support** for the new lab director to lab staff and other senior agency officials publicly, perhaps through occasional visits to the lab.

## The view from the former lab director

Some leaders have found that keeping the former lab director around for a training and/or mentorship period helps ease the transition, but others have found that simply getting out of the way and allowing the next leader to step in fully is the way to go. In either situation lab leadership should find a way to offer help and extend assurance that they can answer any questions.

"It's true that every jurisdiction has its quirks, but I want to emphasize that we have more in common than we have differences.

We're talking about organizational changes and dynamics—and there are general principles on this topic. We might be labs, but we are organizations first."

As this former lab director states, a lab often functions like any other business organization. The incoming lab director, staff, leadership and parent organization will all learn some good lessons. As leaders and officials tasked with hiring, document these experiences so you can reference them in the future.



# VI. Cultivating Your Network:

## Guide for New Directors and Lab Leaders

In leading nearly 90 state and local public health labs across the country, lab directors nationwide have created a broad and knowledgeable informal network. And most labs have been through a director transition at some point.

Try tapping your state- and region-wide lab communities to get word-of-mouth recommendations during the early stages of your transition. Does someone know of a lab director looking for a new position? Was someone recently impressed with a senior manager ready to make the move into a director role?

Even the best word-of-mouth references might not result in a candidate that's right, however. Filter what you hear through your matrix of needs and strengths.

**APHL runs state and local lab Listservs® that will help spread the word about open positions. These email threads include top experts you can informally consult for help throughout the transition process. Contact Member Services for more information.**

### Keep the network healthy

Your network doesn't go dark after your lab director has been hired. Keep drawing on your network: This use could come in the form of simply posing your onboarding questions to email lists. What are the challenges for your new director—speaking to media? Grant writing? Chances are another lab director has already been through a similar situation. And giving back, by sharing a resource or material you think would benefit other labs, attracts goodwill.

However, be watchful as to what you discuss with the outside world, one director warns. You don't want to share what might be a delicate internal matter with, say, an entire online forum.

Elevate connections made to a mentorship level—if both parties are inclined and have the time. APHL's resources include a step-by-step guide on how to set up your own mentorship program.

### For the lab director: Create an advisory committee

The outgoing lab director can often be your best resource. If that's not possible, try creating your own informal advisory committee to get diverse skills and view-points (and contacts). One

leader calls such a committee indispensable for other issues as well, providing support, advice and advocacy.

Who best makes up the group depends on the lab's setting and services, but they should be representative of your significant user community and include those who are well-recognized in the public health world.

**"I used the advisory group in different ways over time, depending on priorities. We discussed new technologies and methodologies, the role of the lab and how to implement and perfect methods within the lab."**

The group would help with strategic thinking as well as operational issues to make certain the lab is serving needs of clients well. Regular communication with them is vital. And if things go wrong, this committee becomes especially important. Since they know which actions you've been taking and why, they become your best advocates.

# VII. Life After Hire:

## Guide for New Directors

### SECTION 1: TOP TEN ONBOARDING TIPS

Congratulations! You've been selected as your lab's new director—or you've just found your new director and are looking for ways to make the transition work for everyone.

APHL has talked to lab leadership and gathered the top ten pieces of wisdom about onboarding. Your priorities may vary—these aren't in order of importance.

In the APHL [Lab Director Transitions Toolkit](#), you'll find more in-depth information on each of these steps, as well as more onboarding help, including sample documents and checklists that can make the first 100 days more effective.

Another resource for those in (or about to be in) lab leadership positions is the **APHL Practical Guide for Public Health Laboratory Leaders**, a comprehensive guide on the role of a public health lab director. **Contact Member Services** to get a copy.

#### **Analyze lab's strengths and weaknesses.**

Get to know your lab in and out. This includes learning which scientific program areas the lab deals with on a daily basis, from newborn screening to infectious diseases. Find where your own knowledge gaps are—and start to fill them. Downloading information from the people within your lab is the place to start. Another route: Research program areas through the APHL site.

**Form relationships with staff.** Start with your management team; you'll be working with them on most tasks, and you'll need to share a common vision.

Next up: the rest of your staff. New directors need to show who they are, and then be who

they are, one leader says. So meet all your staff members, and show them you're open to their input not just on the day-to-day tasks, but on the lab's vision, goals and strategic plan. Make it a priority to develop a channel or use an existing one for staff to share views with the director or leadership, and make sure your staff knows about it. At this point, it's enough just to let people know that you're creating such a channel.

**Create a strategic plan.** Does the lab already have one? How old is it, and does it still apply? Study the vision, mission and organizational goals, and gauge if everyone at the lab is on the same page. If these items need reorganization, get all leadership involved and tap a variety of voices in any changes.

Try to address your strategic plan by the six-month mark. But you can begin gathering data and information and getting acquainted with the system and people from the onset. Start with ground rules and operational goals. After you gain more familiarity with the situation, you can start thinking ahead with the strategic plan. Include staff in the big-picture questions: How is your job and how do you see your needs changing in the next five years? And what will you need to make it work?

Anticipating the probable answer, one longtime lab director cautions that a strategic plan is not about funding, at least not in the initial stages. It's about looking forward and determining what's needed, from a new piece of equipment to a new process to a new lab. Figuring out what resources are needed to make it work and getting them is a different process. Disregarding the money question goes against most people's habits of thinking, but bringing budget in too early distorts strategic planning.

**Learn your reporting structure.** Consider the kind of system your lab is a part of. Is it a component of the state, university or other type of setting? Who needs to know what you're doing, and who

are you required to report to? How will you get your goals accomplished within this setting? A lab usually works in collaboration with a state health department and an environmental agency or agricultural agency. Establish open communication with the entities in your larger system. Knowing these relationships among agencies will help as all try to find—and vie for—funding, making it easier to develop “everybody wins” solutions.

**Create your professional network.** After analyzing your reporting structure, ask yourself who among these will help you get things done. Who makes the decisions? Likely, they’ll be your sources of funding. Though these people can be outside your direct network—and reporting to different higher-ups—it’s important to find out what they need and to address those needs. This network could include those from universities, hospitals, CDC and APHL.

**"As a new lab director, I was compelled to testify before our legislature in my first few months. Our legislative liaison was a life-saver. Get to know that person, and soon!"**

**Find your advisors.** This means developing a slightly different—and sometimes more personal—network. Mentors—those who are more advanced in their careers or who have been where you are now—are one important type of advisor. Another way is to establish an informal advisory committee of colleagues and peers from outside the lab. This can include leaders from academia, hospitals, clinical labs, health care, government or environmental, agricultural or enforcement sectors. Such a group can serve multiple purposes: sharing best practices, keeping abreast of news that affects all and encouraging networking and collaboration. It’s a place to try out ideas or test a strategic plan. You’ll be helping the advisors as much as they are you. Gatherings can range from social events to seminars.

While face-to-face contacts in your state and community are indispensable—and these will be the most important ones at first—colleagues at a distance have an objective viewpoint and ideas that can benefit you as well. Take advantage of online forums and gatherings such as APHL meetings.

**Understand your budget.** Being the advocate and fundraiser for your lab is one of the most important positions of the lab director. This role includes staying up-to-speed on state policies and any changes within them. Furthermore, state budgets are becoming increasingly difficult to work with and within. For all these reasons, effective interactions with state legislatures are key. Legislative operations are different state to state—so get to know yours in detail and how you can affect the budget process.

In many situations, there’s an office or department within public health whose job it is to interact with the legislature: Use it. These people not only act as liaison but can fill you in on what questions you should be asking. Go to hearings, learn the key players and meet regularly with key funders. Even if you don’t have much pull in your position, the best leverage you can have is to understand the legislative process inside and out. APHL has resources on how to cultivate funding outside of state budgets.

**Get to know how business gets done.** As important as getting to know your lab is getting to know your surroundings. This involves not just your responsibilities—but how much license you have to get things done. What are you expected to do? And what is accepted: Can you talk with the press, legislatures and other department heads? Or are there intermediaries that do that? There will always be some sort of political boundaries, so learn what they are and work with them.

Next, find effective, timely ways to stay informed. As spokesperson, you must keep well-versed on the public health issues going on outside your lab. Know the political hot potatoes and how to address specific political leaders. Tap your public information officers—they can steer you in the right direction on the media and communications side: whom to talk to, whom to avoid, what questions varying reporters typically ask and the like.



**Find out what programs and resources are available.** Supplement your own onboarding process with existing pointers and guidance. Outside resources can help you better see the big picture. APHL offers a host of onboarding resources for lab directors to use in their first few months.

Professional and lab development programs can also help you service your entire lab system. For example, APHL's Lab Systems Improvement Program is a way lab leaders can get all lab partners and stakeholders together and involved—and collaboratively enhance the lab. This also helps connect multiple labs in the same state, gets partners talking about needs and gaps, and adds to the overall dialogue of the public health lab system evaluation.

Connect to **APHL's Lab Systems Improvement Program**, the **APHL Member Resource Center** and more through the [Lab Director Transitions Toolkit](#).

**Find your Test Services Manual (or develop one with help from other labs).** This is your guidebook to getting all the details of lab work correct—submission requirements, contacts, testing information. To whom do you need to report; what do you need to report; what are shipping requirements for specimens? This is your go-to book for your basic job requirements, so make it something you can work with easily. Some good examples are the [Oregon](#) and [Minnesota](#) Test Services Manuals.

## SECTION 2: NAVIGATING CHALLENGE POINTS

Although these tips are all for the purpose of making smooth transitions, keep in mind there will always be surprises. A piece of critical knowledge will emerge a day too late. A staff member will test your limits. And there will always be some sort of gap in your background—and that's OK. It's a new job with new tricks to learn. Just be open, be willing to learn on the fly and trust your own judgment.

You're a new leader, so it will take time to establish—and get staff acquainted with—your leadership style. Be true to your personality, and be sure your style reflects your values and character. And give everyone a chance to adjust. You want to get things moving, but not so quickly that you lose people along the way. It's important to gauge the right time to start doing bigger things in the organization.

**“Don't overthink it. If you have the requisite background that's being asked for, you should have the essential leadership and management tools to make that transition for yourself, the lab and the parent organization.”**

### Remember the value

Unlike a clinical lab, a public health lab focuses less on real-time patient results and more on creating value out of data. A public health lab's mission lies in going beyond analyzing information to ask what that data means in the larger scope of public health—tracking a shift in antibiotic resistance, for instance.

In the day-to-day work of performing tests, don't lose sight of this larger public health mission, lab directors say. Quick test turnarounds are often what get the noise—but how fast you can turn lots of tests around is not the true measure of a public health lab. Remember the larger value your lab adds to national health surveillance. No other type of lab is charged with what your team is doing.

### Working with government

Those coming into the director position from other parts of the lab world might not be familiar with how to deal with government agencies. CDC, for example, is a large, complex organization on the whole, but it's not difficult to work with the individuals there. Orient yourself with key players who can help you navigate unfamiliar government waters.

Don't be surprised if you find yourself in the situation of getting a job candidate, visitor or request from the political administration. A person coming in with a political referral could very well be the best candidate for the job—but in the end, you're the director and you make the decisions that govern the lab and are best for public health. Every job candidate can be judged on his or her merits. Every decision on action must be weighed against the lab's core functions.

### Dealing with media

Most lab directors don't come into the job accustomed to standing in front of a television camera. And even if you have dealt with the media before, interacting with reporters can be difficult to master. Know you'll need some education on the topic—your public information officer is a good start.

**APHL also offers tools on communicating with the media and sponsors periodic media workshops for new directors where you can practice your on-camera skills. Contact [info@aphl.org](mailto:info@aphl.org) for more details.**

**Know state guidelines:** State guidelines for working with the media vary but you can expect that all communications will be closely controlled through the health department or, in some instances, the governor's office.

**Understand hierarchies and protocol:** Learn how your state's communications hierarchy is organized and the procedures to respond to a media inquiry. Requests for interviews are typically routed through the public information office within the health agency. If the office approves a request, you may be asked to speak with a reporter.

**Ace the interview:** It is critical that you take time before the interview to prepare what you want to say. Remember: The media wants to capture a story—a narrative with a beginning, middle and end. Think about what you want the reporter to convey. Did your lab recently detect a baby with SCID? Test well water following a massive flood? Detect the agent causing an outbreak of foodborne disease? Whatever the point, tell them a story and make it vivid by explaining how the lab's hard work saved a child from a lifetime of disability or helped end a nationwide outbreak of *E. coli* O157:H7. Even if you are not the one who is the media spokesperson for your lab, understanding what to say and not to say will benefit you in making your case for the lab within your agency and to the community surrounding your facility.

## VIII. More Ways Lab Leadership and Directors Can Use APHL

APHL is the top source for public health laboratory leadership—and those going through lab director transitions are no exception. If you're a member already, the experience of lab leaders is there for you to use. Members have access to one-on-one help and numerous specialized services and resources.

And if you aren't already a member, consider joining by contacting Member Services. Here are some more ways to connect:

- Your No. 1 lab director transitions resource is the **APHL Lab Director Transitions Toolkit** on our website. Organized by transitional stage, the toolkit directs readers to checklists, resources and quick tips within APHL and without, from lab preparation and recruitment to onboarding resources for the director.
- As both resource center and national liaison, APHL also provides **technical assistance** at every stage. We research inquiries thoroughly to respond with informed guidance.
- We also offer fee-based organizational and informatics consulting services that bring our expertise right to your laboratory. Services are affordable and tailored to your specific lab and health department needs. Contact [info@aphl.org](mailto:info@aphl.org) for more information.
- Search the [Member Resources Center \(MRC\)](#) for shared best practices, protocols, communications tools and other materials on the topic of transitions. Search the **Survey Resource Center (SRC)** for current survey data such as laboratory profiles—snapshots of the critical information from every public health lab, both at state and local levels.
- Attend a **new director orientation program** or other leadership forum through the National Center for Public Health Laboratory Leadership.

- Learn, network and collaborate with others at the **APHL Annual Meeting** and other association-sponsored gatherings.
- Send lab staff to a **continuing education training program** with the National Laboratory Training Network or APHL Training.
- Consider joining an [APHL committee](#) or tap an expert from the Workforce Development Committee, which addresses transitions specifically. APHL committees advance issues of importance to the nation's collective health.
- Read your APHL **weekly E-Update**, which includes funding announcements, member and partner news, featured upcoming trainings and career notes.
- Download [A Practical Guide for Public Health Laboratory Leaders](#), a comprehensive guide to the role and responsibilities of a public health lab director.

### Contact us

Call us if you need additional help or guidance. Chances are we know another lab that's been through the same challenges as you. If we can't provide an answer, we can identify the resources or people who can.

Contact the Member Services department at **240-485-2745**.



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