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| S:\VAULT\LOGO Document Use Only\CSMLS_official_logo_PRINT.tif |
| **Annual**  **Performance**  **Appraisal**  ***Manager / Specialist***  ***With staff and/or Budget*** |
| Employee’s Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Job Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date in Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date of Review: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Completed By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

## Section One: Evaluating Competencies

**Only include comments and/or examples to support your ratings if ranked as EE or RI**

**ALL RI rankings must have a goal on the goal sheet**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Exceeds Expectations**  **(EE)** | **Achieves Expectations**  **(AE)** | **Requires Improvement**  **(RI)** | | | |
| Performance and results are consistently beyond expectations set for the individual as well as the objectives and requirements of the position in most areas.  Consistently aligns effort with organizational priorities. Seeks additional responsibility. | Performance and results consistently meet expectations set for the individual as well as the objectives and requirements of the position and at times exceeds them. Takes initiative. Puts feedback into action. | Performance and results do not consistently meet expectations set for the individual as well as the objectives and requirements of the position. May require a moderate degree of additional training or guidance to achieve requirements. | | | |
| **Core Competency** | | | **EE** | **AE** | **RI** |
| **Customer Focus (Our Members are Everything):**  Putting member needs first  Considers impact on member product & services when making decisions  Uses member feedback to recommend improvements in products and services  Develops and implements practices and programs that will benefit the organization while improving customer satisfaction  Builds and maintains connections with internal and external groups that could improve organizational delivery and/or customer satisfaction | | |  |  |  |
| **Communication (Respect Everyone):**  **Always communicates in an open and authentic manner**  Practices attentive and active listening  **Knows and understands what and when information needs to be shared with others (own department & across organization)**  **Gives and receives timely feedback**  **Assumes positive intent**  **Presents constructive feedback or difficult communication in a manner that supports expectations and fosters open conversation**  Anticipates and responds to employee needs by modifying the approach, content and format of communications | | |  |  |  |
| **Teamwork (Aim for Awesome):**  Is open and willing to assist and/or train others  Embraces the ‘other duties as assigned’ attitude  Understands organizational goals and own role priorities to know how to shift workload to help with key tasks when needed  Knows when to ask for help – use expertise available to be efficient  Prioritizes collaborating and cooperation  Values and encourages teamwork through daily actions and by soliciting the feedback from all areas of the organization  Builds cooperation and communication between all departments, recognizing when different teams/employees could work together for improved success | | |  |  |  |
| **Personal Credibility (Dependable):**  **Demonstrates concern that one be perceived as responsible**  **Reliable, trustworthy;** keeps commitments  Behaves in a consistent and ethical manner  Takes ownership of work and one’s own actions  Builds trust and credibility by demonstrating consistency between words and actions  Takes responsibility and ownership over team commitment and mistakes – gives wins to employees  Displays a high level of organizational confidentiality and respects the sensitivity of information  Takes time to get to know others, asks questions, finds a common bond and develops professional rapport | | |  |  |  |

**Comments/Supporting Examples:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Exceeds Expectations**  **(EE)** | **Achieves Expectations**  **(AE)** | **Requires Improvement**  **(RI)** | | | |
| Performance and results are consistently beyond expectations set for the individual as well as the objectives and requirements of the position in most areas. Consistently aligns effort with organizational priorities. Seeks additional responsibility. | Performance and results consistently meet expectations set for the individual as well as the objectives and requirements of the position and at times exceeds them. Takes initiative. Puts feedback into action. | Performance and results do not consistently meet expectations set for the individual as well as the objectives and requirements of the position. May require a moderate degree of additional training or guidance to achieve objectives and requirements. | | | |
| **Job Specific Competency** | | | **EE** | **AE** | **RI** |
| **Functional/Technical Skills (Keep Learning):**  Review current job description. Are all tasks being completed?  Performs full scope of role (everything on job description?)  Has the functional and technical knowledge and skills to do the job  Identifies when to expand skills versus use external expertise | | |  |  |  |
| **Learning on the Fly (Always Adapt):**  Positive attitude towards continuous learning  Willingness to learn new ways to do things  Analyzes both successes and failures for clues to improvement  Experiments and will try anything to find solutions  Changes behavioural style or method of approach when necessary to achieve a goal  Adapts to change quickly and easily and makes suggestions for increasing the effectiveness of changes  Takes the lead in implementing changes by engaging others, addressing behaviours and anticipating barriers | | |  |  |  |
| **Leadership & Coaching (as applicable with staff):**  Clear and firm understanding of the vision, mission, values and objectives of the organization  Develops and aligns objectives for staff that fit within team and organizational goals  Works to improve and reinforce performance of others  Creates an environment that allows staff to feel motivated to work, interact and establishes trust  Builds commitment and engagement to the vision, mission and values of the organization  Provides recognition and encouragement to team and others within the organization  Motivates and supports others to accomplish team and organizational goals  Shares knowledge freely with others  Builds trust by keeping word, commitments and promises  Admits mistakes | | |  |  |  |
| **Innovation:**  **Develops, sponsors, or supports the introduction of new and improved methods, products, procedures, or technologies**  Analyzes current procedures for possible improvements and eliminate processes that do not add value  Questions the plans and actions of others to ensure they are well thought out and appropriate | | |  |  |  |
| **Problem Solving:**  Breaks down issues in order to identify core components  Uses multiple sources in order to gather complete and accurate data  Asks knowledgeable people in order to gain insight, information and perspectives in order to assist with next steps  Sees how a problem and its solution will affect others  Stays updated on best practices and recommended actions in order to identify new approaches and methods to improve solution building  Anticipates when situations will require higher level support and involves the right people in addressing needs in order to develop outcomes  Makes timely decisions even when information is unclear or limited  Aligns solutions with the mission, vision, values, MVP and future direction of the organization  Willing to take action, even under pressure, criticism or tight deadlines  Takes informed risks | | |  |  |  |
| **Financial Awareness:**  Demonstrates accountability for assigned budget  Understands that their actions have a financial impact  Keep appropriate records of functional areas spending  Continues to develop business acumen  Adheres to all internal control procedures, forward concerns and complies with organizational policies, procedures and practices surrounding resources, time and finances  Monitors assigned budget(s), ensuring compliance, offering feedback and cost saving alternatives to senior management | | |  |  |  |

### Comments/Supporting Examples:

**Section Two: Achievements**

1. Indicate any key achievement(s) the employee has accomplished during this review period
2. Use Goal Sheet (paste in) to show which have been achieved
3. Relate achievements to Strategy, Tactics, Training, Development, and Culture

## Section Four: Challenges & Opportunities

## Indicate any difficult or challenging work- or work-related situation the employee encountered during this review period.

## List any areas of work performance, skills/abilities or professional behaviour the employee needs improvement in or has identified desire to develop.

1. All items listed in this section must have a **goal attached** to it on the Goal Sheet.

## Section Four: Goals Sheet - next six months/year

1. Review Goals previously set
2. Indicate why goals have not been achieved & what resources are needed (if applicable)
3. Do not use ‘ongoing’ as a deadline
4. At least one goal needs to be member focused
5. **All goals are subject to review and change**

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| --- | --- | --- | --- | --- | --- | --- |
| **Goal/Task/Training**  **(Current role focus)** | **Related to which Strategy Tactic or Operations?** | **Which culture principle is important to be successful?** | **What strength do you bring to this goal/task? OR what will you learn?** | **Measure (how will you know it is achieved?)** | **Deadline for achievement (month expected)** | **Achieved?**  **Y/N** |
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(Optional – Professional Development)

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| **Goal/Task/Development**  **(Growth focus)** | **How related to career growth?** | **What strength do you bring to this goal/task? OR what will you learn?** | **Measure (how will you know it is achieved?)** | **Deadline for achievement (month expected)** | **Achieved?**  **Y/N** |
|  |  |  |  |  |  |

\*This section should be copied and used for the:

* Six month check in conversation & goal check
* Next full performance appraisal under ‘Achievements’ section with indication of completion or not

**Section Five: Overall Summary & Sign Off**

**Employee’s Comments:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Employee’s Signature Date*

**Manager’s Comments:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Manager’s Signature* *Date*

**Provide HR with a copy now (electronic preferred). Next level will be organized by HR.**

**Next Level Review:**

**Next Level Review:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Next Level Signature*  *Date*

**Appendix I**

**Strategies & Supporting Tactics to be referenced on goal sheet**

(See more on our strategic plan here <https://csmls.org/About-Us/About-CSMLS/Strategic-Planning.aspx>

Tactics we will be working on in 2024 (to give suggestions for goal setting):

***Strategy 1: Empower medical laboratory professionals to succeed in a dynamic and challenging work environment.*** Our focus for Strategy 1 is to ensure members have the resources required to empower them to succeed in their role.

|  |  |  |  |
| --- | --- | --- | --- |
| **Tactics** | **Lead** | **Multi-Year** | **Staff resources** |
| **Learning Strategy** - focus in 2024 will be to continue to have in person learning and new content focused on addressing challenges; such as leadership Gap, Mental Health, Educators etc. | Lori | Yes | Medium (scalable based on staffing) |
| **Under 5 Strategy** – Targeted communication to build a sense of community for this group of members | Genevieve | Yes | Medium (scalable based on staffing) |
| **MLA Strategy** – Look at eligibility requirements for MLA membership and any bylaws changes required to expand this membership | Joe | Yes | Low |

***Strategy 2: Make CSMLS indispensable to our members at all stages of their careers.*** Strategy 2 is focusing on ensuring we have the correct services to ensure members see value and maintain their membership.

|  |  |  |  |
| --- | --- | --- | --- |
| **Tactics** | **Lead** | **Multi-Year** | **Staff resources** |
| **EDI** – Add EDI content to the Learning Centre in 2024 by curating content we already have on our website and adding it to the Learning Centre | Joe | Yes(if needed based on staffing) | Medium |
| **Public Promotion** – Continue with the public promotion but will research new goal for public promotion to address the challenge with what members are looking for from an advocacy standpoint and budget | Mike | Yes | Medium |

***Strategy 3: Advocate for solutions within the health care system on behalf of the medical laboratory profession.*** Our focus for Strategy 3 in 2024 is to address challenges of workload by continuing to support and advocate for Choosing Wisely Canada Medical Laboratory Science, MLA regulation, Mental Health Support and looking into Subject Certification.

|  |  |  |  |
| --- | --- | --- | --- |
| **Tactics** | **Lead** | **Multi-Year** | **Staff resources** |
| Continue to support provinces for regulation of MLPs | Christine/Mike | Yes | Medium to High |
| Continue to support capacity building on the demand (Choosing wisely) | Brandon | Yes | Medium |
| Continue to support capacity building on the supply side (Media, advocacy, simulation, bridging etc) | Christine | Yes | Medium to high |
| Subject Certification Feasibility Study; Can employers hire; Can regulators regulate? What is the potential volume? PLA or domestic are just some items to look at. | Brandon/Christine | Yes | Medium |

***Strategy 4: Be the acknowledged leader for certification in medical laboratory science across Canada.*** Our focus for Strategy 4 is to ensure continued confidence in our MLT exam by the regulators and increase the number of MLAs taking our MLA exam.

|  |  |  |  |
| --- | --- | --- | --- |
| **Tactics** | **Lead** | **Multi-Year** | **Staff resources** |
| Implement changes to exam process for low volume testing | Lorna | Yes | Low to medium |
| Assess 17024 Accreditation readiness (continuation)   * Complete training in 2022 * Evaluate readiness in 2023 | Denise | Yes | Low |
| Create pilot certification auditing program (continuation) | Denise | Yes | Medium to high |

***Operations:***

|  |  |  |  |
| --- | --- | --- | --- |
| **Tactics** | **Lead** | **Multi-Year** | **Staff resources** |
| Ensure financial stability of organization | Joe | Yes | Low |
| Website Upgrade | Genevieve/Kartik | Yes (if needed) | Medium to high |

**Appendix II**

CSMLS Culture Principles

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| **Corporate Culture Competency** |
| **Respect Everyone:**  A healthy work environment is the only work environment we want here. That isn’t possible without respect, where different people and different perspectives are valued. Good ideas come from anyone and anywhere. Be open and always assume good intent. Tolerate nothing less from yourself and each other. |
| **Aim for Awesome:**  We are passionate about achieving great results. This passion should be infectious and we should feed off of each other’s enthusiasm. WE will never apologize for having high expectations of ourselves and each other. |
| **Always Adapt:**  Without change, we can’t grow and we can’t get better. So we embrace change, which means we need to adapt to what’s going on in the profession we serve, the association and regulatory industries we operate in, and changes within our membership. We keep an eye to the future to make changes proactively |
| **Be Dependable:**  Our success is never the result of a single individual. Everyone is counted on to do their part. Do your part and do it well. Leverage the strengths of others and support one another. Be accountable for your mistakes as this is how we learn. Ask for help and give help. |
| **Keep Learning:**  **We believe that when you grow, we grow. Everyone has greatness in them and it is our collective responsibility to nurture that. We want enquiring minds that are willing to learn and are open to what may be. For some this may mean formal education. For others it may be reading and sharing articles. However it manifests, we want learning, growth and development to be omnipresent in the organization and everyone’s responsibility.** |
| **Our Members are Everything:**  **Without members we don’t exist. It’s that simple. Seek to understand our members so that we can stay relevant and deliver value. Look to create positive interactions and forge relationships with our members that will last.** |