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| **Annual**  **Performance**  **Appraisal**  ***Senior Management*** |
| 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):**  Puts member needs first  Considers impact on member product & services when making decisions  Analyzes & anticipates member long term needs by establishing a clear sense of member needs  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 communicate 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):**  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  Develops teams that offer a diverse range of perspectives and experience  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:**

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| --- | --- | --- | --- | --- | --- |
| **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  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  Anticipates future needs or changes within the work environment  Takes the lead in implementing changes by engaging others, addressing behaviours and anticipating barriers  Shifts priorities and alters strategies to respond to emerging opportunities or risks | | |  |  |  |
| **Resource Management:**  Demonstrates accountability for assigned budget  Creates yearly spending plan for all budget accounts  Reallocates resources as organizational change occurs  Gathers and organizes credible data to make a business case for changes and additional resources  Continues to develop business acumen  Develops priorities and plans for effective use of resources in order to meet organizational objectives aligned with financial constraints | | |  |  |  |
| **Leadership & Managing Strategy:**  Clear and firm understanding of the vision, mission, values and objectives of the organization  Inspires and motivates individuals or teams  Develops and aligns objectives for staff that fit within team and organizational goals  Builds commitment and engagement to the vision, mission and values of the organization  Recognizes strengths and weaknesses of others and will match duties accordingly  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 | | |  |  |  |
| **Discernment/Judgement:**  Makes decisions that considers the interests of various stakeholders even when the situation is ambiguous  Explains the rationale for strategic and/or decisions that impact the workplace  Makes timely decisions even when information is unclear or limited  Balances risks and potential implications before making a decision  Will make tough decisions that support the organization even if they may be perceived as unfavourable by others  Aligns decisions with the mission, vision, values, MVP and future direction of the organization  Refrains from "jumping to conclusions" based on no, or minimal, evidence  Considers cost and efficiency when making decisions establishing or changing work procedures  Appropriately balances needs and desires with available resources and constraints  Recognizes when to escalate appropriate or specific situations to the next higher level of expertise | | |  |  |  |

### 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 Three: 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:**

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*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:**

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*CEO 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.

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| --- | --- | --- | --- |
| **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.

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| --- | --- | --- | --- |
| **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.

|  |  |  |  |
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| **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.** |