### Annual Report

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Vision
Excellence in Medical Laboratory Science

Mission
To maintain excellence in certification and standards of practice for medical laboratory science in Canada.

To promote a culture of lifelong learning in the medical laboratory community.

To be the national voice and the advocate for medical laboratory science.

To provide exemplary service to our members.

To develop innovative partnerships with health care organizations and other stakeholders.

To be a leader in the international community.

Values
CSMLS is committed to promoting high ethical and professional values. We strive for excellence in all our endeavours. The foundation of our organization is built upon:

Integrity
■ Our actions are honest and trustworthy.
■ Our processes are democratic and open.

Accountability
■ We are responsible to our membership and stakeholders.
■ We maintain and promote high standards of practice in the delivery of quality health care.

Respect
■ We build professional partnerships through consensus and collaboration.
■ We value the dignity, equality, diversity and privacy of all.
■ We value, encourage and support volunteers and staff.

Commitment
■ Our standards ensure high quality medical laboratory professionals who are valued throughout Canada and the world.
■ We are proactive in meeting the needs of our members and our community.
Being President in 2007 was a bit like sky diving—exciting, terrifying and exhilarating all at the same time.

CSMLS took the plunge into the first phase of our advocacy program. Ably assisted by our government relations consultants at Impact Public Affairs, representatives of the Board of Directors and the executive staff met with a total of 14 members of Parliament in 2007.

The highlight of our advocacy activities was the ‘mini-lobby day’ on Parliament Hill on April 24. We started the day by unveiling CSMLS’s new public service announcement for National Medical Laboratory Week in the new biochemistry and hematology laboratory at the Ottawa Hospital. Mr. Steven Fletcher, Member of Parliament for Charleswood—St. James—Assiniboia and Parliamentary Secretary to the Minister of Health, was on hand to say a few words about the important role that medical laboratory professionals play in Canada’s health care system. Later in the day, Director of Certification, Christine Nielsen, Executive Director, Kurt Davis, President Elect, Susan Atkinson and I met with members of Parliament and officials from Health Canada and Human Resources and Social Development Canada (HRSDC).

In March, Kurt delivered a presentation on the challenges of integrating internationally-educated medical laboratory professionals into the Canadian workforce at a special session of the Standing Committee on Human Resources, Social Development and the Status of Persons with Disabilities (HUMA). He also represented CSMLS at three important multi-disciplinary health care meetings; The Joint Committee for the Cancer Workforce, The Taming of the Queue and The Canadian Institute on Health Information’s Human Resource Summit. Participating in events such as these gives us the opportunity to voice our concerns about issues affecting the medical laboratory profession and broadens our perspective on the health care system as a whole.
To be truly effective, we must actively engage all of our members in our advocacy efforts. In the fall, we sent a survey to our members to help us identify the priorities for action in the coming years; we received over 750 responses. A report on the results of the survey will be published in CJMLS later in 2008.

The availability of reliable, profession-specific information is crucial to the success of the CSMLS strategic plan. Over the past year, Director of Research, Dr. Moira Grant has established the foundation for the society’s strategic research initiatives by developing an ethical review policy, a policy statement on ethical conduct in research and a comprehensive set of guidelines. The Board of Directors recently approved the appointment of a 12-member Research Ethics Board. With the foundation firmly in place, we have ensured that the ethical conduct of research is a guiding principle for our research endeavors. This in turn will enhance the credibility of our research program and expand our access to major sources of funding.

In May, we hosted our first ever Leadership Forum in Hamilton. The program was a total departure from our traditional congress and we weren’t completely sure of how it would be received by our members. From the moment opening keynote speaker Stephen Lewis took the stage, it was clear that the decision to break from tradition was the right one. We received glowing comments from delegates about the quality of the program, and the event was financially successful. Many thanks to my colleague on the Board of Directors, Kate Gagliardi, for having had the courage to Chair this ground-breaking event, and to the volunteers and members of the CSMLS staff who worked so hard to make it a success.

We received good news in June when we learned that the Canadian Medical Association’s Conjoint Committee on Accreditation (CCA) had accepted our proposal to include medical laboratory assistants in the national accreditation process. This will ensure that education programs for medical laboratory assistants meet national standards established by the CCA.

In keeping with our year of ‘firsts,’ we have adopted a new format for this year’s annual report. Rather than presenting departmental reports, we have presented the highlights of the key areas of the strategic plan. I hope that when you read the rest of the annual report, you will share the same sense of pride that I feel about CSMLS’s accomplishments in 2007. CSMLS has truly become the ‘national voice’ of Canada’s medical laboratory professionals and is living our vision of “excellence in medical laboratory science.”
In 2006, we had a vision. Our Board of Directors launched a landmark strategic plan that moved us beyond our comfort zone and challenged us to take risks. The plan set bold objectives for us, particularly in the areas of research and advocacy. Putting the plan into action required a tremendous investment in terms of time and commitment, and in 2007, we started to see results.

As you’ll read in the research section of this report, CSMLS received a total of $245,204 in research grants in 2007. This is unprecedented in the Society’s history and validates the Board of Director’s decision to take make research one of the cornerstones of the strategic plan. Investing in research today will provide accurate data and information that can be used by employers, educators, governments and health policy planners, to make informed decisions about the future of Canada’s medical laboratory profession.

Working with our new government relations firm, Impact Public Affairs, has been a learning experience for us. CSMLS has enjoyed many successes in the area of advocacy, but in order to move to ‘the next level,’ the Board recognized that we needed the expertise of an experienced government relations specialist. Impact’s President, Huw Williams, has worked on the staffs of several political officials at the national and provincial levels and has extensive experience in media relations and communications. His insight and expertise has helped us develop a more strategic approach to government relations—one that has already yielded positive results for the Society.

There was a time, not so long ago, when CSMLS had to ask to be invited to attend meetings of health care leaders and government decision makers. As a result, important public policy decisions about the health care system were made without input from medical laboratory professionals. CSMLS is now represented on several health care organizations (for the complete list see page 12). Our expertise on medical laboratory related issues
is sought out by governments and health care organizations. As Executive Director and as a medical laboratory technologist, I am proud of the progress that we have made in raising the profile of Canada’s medical laboratory professionals.

Response to the CSMLS Leadership Forum was overwhelmingly positive. Initially, we had projected that the forum would break even or perhaps, even sustain a small loss. To our pleasant surprise, the forum made a modest profit. This was due in large measure to the generous support that we received from our corporate sponsors.

Unlike our traditional national congress, the forum was planned and coordinated by members of the CSMLS staff. This was an ambitious undertaking that required many hours of additional work. I wish to thank each member of our staff for working so hard to ensure the forum’s success.

CSMLS is moving towards implementing a comprehensive quality system for the head office. Unlike the laboratory where quality management is a way of life, the CSMLS staff has had little exposure to formal quality systems. We needed to take the time to educate ourselves, and to develop a quality system that meets the unique needs of a professional association. Since hiring a consultant in January of 2007, we have made significant progress. A quality policy, which serves as the foundation for our quality systems initiatives, was developed and shared with the staff. Process maps, policies and procedures were developed for key processes in each department. The next step in the quality systems initiative is implementation of a document control system that can be accessed on the office SharePoint system.

There were a number of staffing changes at the CSMLS office in 2007. The Certification Department welcomed Kim Burke as Administrative Assistant and Rosemary Baptista as Customer Service Representative. In the Communication Department, the position of Coordinator of Bilingual Services and Publications was split into two. Richard Hockney was hired as Publications Coordinator and Claudia Niemiec was hired as Administrative Assistant, Bilingual Services. In May, Yvonne Cruden retired from her position as Customer Service Clerk, Membership Services. I wish to thank Yvonne for her many years of dedicated service to the CSMLS.

The CSMLS is extremely fortunate in so many ways. Our financial position is strong, our members are loyal, and our credibility as a leader in the medical laboratory community is growing. But without a doubt, our best asset is our dedicated volunteers from across the country. I am continually inspired by the time and energy these individuals give to the CSMLS. Thank you for contributing to a tremendous year.
CSMLS professional recognition

awards

A.R. Shearer Pride of the Profession Award
John Lafferty, Hamilton, ON
Anne Robinson, Moncton, NB
Pauline Tomlin, Edmonton, AB
David Pothier, Yarmouth, NS
Eugene Smith, Dartmouth, NS

Grants & Scholarship
Financial support for continuing education and professional development is provided to CSMLS members through the Founders’ Fund, International Founders’ Fund, the E.V. Booth Scholarship Award and the Barbara Santalab Award. A total of $6,035 was granted to CSMLS members in 2007.

Siemens Healthcare Diagnostics Student Scholarship Award
Sarah Taylor, Courtney, BC
Benjamin Garcia-Canessa, Red Deer, AB

Many thanks to award sponsor, Siemens Healthcare Diagnostics.

David Ball Community Service Award
Curtis Martin, Marystown, NL
Distinguished Fellowship of the CSMLS

Dr. Moira Grant
Toronto, ON

Evelyne Kokoskin
Montreal, QC

CSMLS Student Scholarships

Benjamin Garcia-Canessa,
Red Deer, AB

Sarah Taylor,
Courtney, BC

Amy MacDonald,
Ecum Secum, NS

Barbara Schmidtz,
Saskatoon, SK

Many thanks to the following companies for their support of the CSMLS Student Scholarships:

BD Biosciences
Cowan Insurance Brokers
MDS Laboratory Services
Ortho-Clinical Diagnostics

Honorary Membership

Lynn Policelli
Hamilton, ON

CSMLS Leadership Forum Award

Grants were provided to six CSMLS members to attend the first CSMLS Leadership Forum.

Jennifer Avery, Victoria, BC
Frederick Ezeanolue, Brampton, ON
Tara Hupaelo, Martensville, SK
Marc Yu, Edmonton, AB
Rana Ward, Gander, NL
Lori Foley, Stephenville, NL

Many thanks to award sponsor, TD Meloche Monnex.
Medical laboratory assistants became the newest health care profession to join the Canadian Medical Association Conjoint Committee on Accreditation (CCA) – the national accreditation body for education programs for 15 health care professions in Canada.

The CCA is currently notifying MLA education programs of their decision and inviting them to register for accreditation (accreditation is voluntary and does involve a cost to the education program). Over the next year, the Council on National Certification will discuss timelines for transitioning the eligibility requirements for the national medical laboratory assistant certification examination. At the current time, the eligibility requirements for medical laboratory assistants are flexible. Eventually, eligibility will be restricted to those who have completed a nationally accredited MLA program bringing the certification process for medical laboratory assistants in line with that of medical laboratory technologists.

Two fast-track item writing workshops hosted by CSMLS generated hundreds of new test items for the clinical genetics and medical laboratory assistant examinations.

A feedback performance program was implemented for unsuccessful candidates on the medical laboratory assistant examination.

The competency profile for diagnostic cytology was reviewed, revised and sent out for final validation.

The first national report on examination performance was published in the February 2007 issue of CJMLS. Prior to publication, the report was sent to accredited medical laboratory technology education programs, and to ministers and deputy ministers of health and education across Canada.

Heritage Canada awarded a $3,125 grant to CSMLS towards the cost of translating the medical laboratory assistant competency profile and examination into French.

An internal audit was conducted to ascertain the true costs associated with providing prior learning assessments—the process by which internationally-educated medical laboratory technologists establish eligibility to challenge the national certification examination. Following the audit, the Board of Directors approved a fee increase of 25 per cent over the next four years to bring the fee in line with the true cost of maintaining the PLA process.

Director of Certification Christine Nielsen gave presentations on the CSMLS prior learning assessment process at several prestigious events including the Canadian Network of National Associations of Regulators’ national conference and the Pan-Canadian Quality Standards in International Credential Evaluation’s Stakeholder Symposium. Most notably, she delivered the keynote presentation at the Council of Atlantic Minister of Education and Training Atlantic International Credentials and Competencies Assessment and Recognition Centre Symposium.

Christine Nielsen was elected to serve a second term as Secretary/Treasurer of the Canadian Network of National Associations of Regulators. She also obtained a Certificate of Mastery in Prior Learning Assessment from the Council of Adult and Experiential Learning.

### Facts and Figures

#### CSMLS Certified Candidates in 2007

<table>
<thead>
<tr>
<th>General Medical Laboratory Technology</th>
<th>Clinical Genetics</th>
<th>Diagnostic Cytology</th>
<th>Medical Laboratory Assistant</th>
</tr>
</thead>
<tbody>
<tr>
<td>586</td>
<td>22</td>
<td>32</td>
<td>236</td>
</tr>
</tbody>
</table>

#### Number of Prior Learning Assessment Applications:

<table>
<thead>
<tr>
<th>Year</th>
<th>Applications</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>279</td>
</tr>
<tr>
<td>2005</td>
<td>279</td>
</tr>
<tr>
<td>2006</td>
<td>289</td>
</tr>
<tr>
<td>2007</td>
<td>310</td>
</tr>
</tbody>
</table>
The total number of course registrations in 2007 reached a five-year high.

• The first online distance education course, *The Pre-analytical Process: What every lab professional should know*, made its debut in March on the CSMLS E-Learning Society. Feedback from course participants was very positive.

• All of the CSMLS distance education courses were converted to a standard style and electronic file format. The content of four MODE Module courses and two CSMLS distance education courses was updated.

• The majority of the 2,200 35 mm slides that accompany distance education courses were converted to digital images on CD-Rom.

• A tracking system was developed and implemented to monitor the total number of registrations for the MODE module and CSMLS distance education courses.

• The process for assessing courses for credit for CSMLS professional recognition programs and advanced certification was streamlined. A fee was introduced for course providers/institutions; the service continues to be free to all CSMLS members.

• Use of a new web-based tool, Turnitin.com, was implemented to mark all course assignments. This tool supports electronic submission and marking of assignments and detects plagiarism.

• A campaign was launched to recruit new course authors. The campaign included introduction of a ‘teaching at the CSMLS’ web page, development of a template for creating on-line courses on the E-Learning Society, and new advertisements in the Canadian Journal of Medical Laboratory Science and at national and provincial congresses.

• An incentive system was implemented to encourage new course authors to meet production timelines.

### New Courses in 2007

**CSMLS Distance Education Courses:**

- Yeast and Actinomycetes
- Introduction to Ethics and Professionalism
- Quality Systems for Canadian Medical Laboratories Part 1
- Performance Management
- The Pre-analytical Process: What every lab professional should know

**MODE Modules:**

- Metabolic diseases of the liver
- Phlebotomy Part 1
- Phlebotomy Part 2
- Phlebotomy Part 3
- Parasites: Cestodes
- Parasites: Nematodes
- Parasites: Trematodes
Impact Public Affairs, the Society’s government relations firm, surveyed Members of Parliament to determine their level of awareness of the medical laboratory profession and of the CSMLS. Results of the survey provided a baseline for development of the Society’s advocacy program and provided valuable insights into how the profession is perceived by MPs.

Huw Williams, President of Impact Public Affairs facilitated two sessions with the Board of Directors to review the results of the MP survey and to develop the first steps in the CSMLS advocacy program.

CSMLS hosted a government relations workshop for members of the National Advisory and National Regulatory Councils at the Leadership Forum.

Members of the CSMLS Board and staff participated in a mini-lobby day on Parliament Hill in Ottawa. Meetings were held with members of parliament and government officials.

A survey was distributed with the October issue of CJMLS and posted to the website to determine which issues should be at the top of the advocacy agenda.

Meetings with Members of Parliament in 2007

<table>
<thead>
<tr>
<th>NAME</th>
<th>RIDING</th>
<th>CAUCUS</th>
<th>ROLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>David Christopherson</td>
<td>Hamilton Centre, ON</td>
<td>NDP</td>
<td>NDP Critic, Infrastructure and Communities, Public Accounts</td>
</tr>
<tr>
<td>Dean Allison</td>
<td>Niagara West-Glanbrook, ON</td>
<td>Conservative</td>
<td>Chair of Human Resources Committee</td>
</tr>
<tr>
<td>Diane Finley</td>
<td>Haldimand-Norfolk, ON</td>
<td>Conservative</td>
<td>Minister of Citizenship and Immigration</td>
</tr>
<tr>
<td>Judy Wasylcya-Leis</td>
<td>Winnipeg North, MB</td>
<td>NDP</td>
<td>NDP Health Critic (as of October 2007)</td>
</tr>
<tr>
<td>Michael Chong</td>
<td>Wellington-Halton Hills, ON</td>
<td>Conservative</td>
<td>Member, Human Resources Committee</td>
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<tr>
<td>Michael Savage</td>
<td>Dartmouth-Cole Harbour, NS</td>
<td>Liberal</td>
<td>Liberal Human Resources Critic</td>
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<tr>
<td>Mike Wallace</td>
<td>Burlington, ON</td>
<td>Conservative</td>
<td>Member, Finance Committee</td>
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<tr>
<td>Patricia Davidson</td>
<td>Sarnia-Lambton, ON</td>
<td>Conservative</td>
<td>Member, Health Committee</td>
</tr>
<tr>
<td>Patrick Brown</td>
<td>Barrie, ON</td>
<td>Conservative</td>
<td>Member, Health and Human Resources Committees</td>
</tr>
<tr>
<td>Penny Priddy</td>
<td>Surrey North, BC</td>
<td>NDP</td>
<td>NDP Health Critic</td>
</tr>
<tr>
<td>Rob Merrifield</td>
<td>Yellowhead, AB</td>
<td>Conservative</td>
<td>Chair, Health Committee</td>
</tr>
<tr>
<td>Ruby Dhalla</td>
<td>Brampton-Springdale, ON</td>
<td>Liberal</td>
<td>Vice-Chair, Health and Human Resources Committees</td>
</tr>
<tr>
<td>Steven Fletcher</td>
<td>Charleswood-St. James-Assiniboia, MB</td>
<td>Conservative</td>
<td>Parliamentary Secretary to the Minister of Health</td>
</tr>
<tr>
<td>Susan Kadis</td>
<td>Thornhill, ON</td>
<td>Liberal</td>
<td>Vice-Chair, Health Committee</td>
</tr>
</tbody>
</table>
Federal Minister of Citizenship and Immigration, Diane Finley (left) gets a first-hand look at the lab at Norfolk General Hospital with Kurt Davis and Laboratory Director, Barry Vermeersch.

### CSMLS Representation on External Organizations/Committees
- Health Action Lobby (HEAL)
- Canadian Network of National Associations of Regulators
- Coalition for Public Health in the 21st Century
- Canadian Council on Health Services Accreditation
- CMA Committee on Conjoint Accreditation
- Canadian Standards Association
- Collaborative Forum on Health Science Education
- Canadian Patient Safety Institute
- Canada Health Infoway

### marketing and membership services

- A new marketing campaign was launched to promote the Advanced Registration Certification (ART). The campaign’s theme, “Master the ART” was inspired by art masterpieces and features vibrantly coloured advertisements and flyers.

- Over 100 students of medical laboratory education programs completed surveys to identify how CSMLS can reach out to young people and encourage them to become members.

- A new member marketing program was implemented to enhance recruitment and retention of student members and new practitioners. The program includes a number of initiatives such as new student membership packages, welcome gifts and a ‘first-timers’ orientation session for delegates at the national congress.

- Recognition certificates were sent to all members with 35 years or more of membership with CSMLS.

- “Give ‘um the Pickle,” a comprehensive customer service program for staff, was launched.

- Pop surveys on continuing education services were completed by over 250 members at provincial congresses across the country. The results provided valuable insights into the continuing education needs of our members.

- Promotional advertisements and brochures for the 2008 Joint CSMLS/BCSLS Congress of Medical Laboratory Science in Kelowna, B.C. were developed.
communication

• The new National Medical Laboratory Week campaign—Your results matter!— was a success. The total number of orders for promotional material was the highest in a decade. A news release generated media coverage from coast to coast including live interviews on popular radio stations in Calgary and Windsor.

• An article about the Lab Test Checklist, which was developed for NMLW, was published in the July issue of Canadian Living.

• A 30-second public service announcement was produced by CSMLS to promote National Medical Laboratory Week. It aired on television stations in British Columbia, Alberta, Saskatchewan, Ontario, Nova Scotia and Newfoundland and was posted to YouTube.com.

• The Canadian Journal of Medical Laboratory Science was redesigned and launched in August 2007.

• Dan Woods was appointed to serve as Chair of the Scientific Advisory Panel.

quality systems

• A consultant was hired to provide expertise and guidance on the quality system initiative to the Executive Team and the Board of Directors.

• Education sessions on quality management and process mapping were held for members of the CSMLS staff.

• A quality policy was developed and shared with the CSMLS staff.

• Process maps and procedures were developed for key business processes in each department. Work started on a document control system using SharePoint.

• The Board of Directors implemented a ‘consent agenda’ to enhance the productivity of quarterly meetings. Under a consent agenda, routine business items, such as minutes and reports of meetings, can be approved by the Board without discussion or individual motions. This gives the Board more time to discuss substantial issues and to engage in strategic planning.

## Facts and Figures:
Orders for NMLW Promotional Material

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<tr>
<td>Total</td>
<td>93</td>
<td>77</td>
<td>144</td>
<td>152</td>
<td>263</td>
<td>209</td>
<td>379</td>
<td>300</td>
<td>407</td>
<td>297</td>
<td>414</td>
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</table>

* Second year of a two-year campaign

Kurt Davis, Robin Power and Steven Fletcher (center), Secretary to the Minister of Health tour the lab at the Ottawa Hospital at the national kick-off to National Medical Laboratory Week
research

• An ethical review policy, a policy statement on ethical conduct in research and a comprehensive set of guidelines, CSMLS Guidelines for Research Involving Human Subjects, were developed. Twelve people were recruited to serve on the CSMLS Research Ethics Board.

• A nine-month study on simulation-based learning in medical laboratory education was completed in November 2007. *Simulation-based Learning in Medical Laboratory Education: Current Perspectives and Practices* was co-authored by Director of Research Dr. Moira Grant and Executive Director Kurt Davis, and funded by Health Canada. The final report was distributed to study participants and stakeholders in November and made available on the CSMLS website in January 2008.

• Dr. Moira Grant conducted a research study, *Preliminary Study on Recruitment and Career Awareness Strategies*, on behalf of the Association of Canadian Community Colleges and the Collaborative Forum on Health Science Education. Dr. Grant presented the results of the study at meetings of the Canadian Association of Allied Health Programs and the Collaborative Forum on Health Science Education.

• The first phase of an 18-month study entitled *Investigation of Language Assessment Tools and Benchmarks Necessary for Success for Internationally Educated Medical Laboratory Technologists*, which was funded by the Government of Ontario, was completed. Preliminary findings of the study recommended the addition of CanTest and the International English Language Testing System (IELTS) to the list of English proficiency tests that CSMLS accepts for the prior learning assessment process. This recommendation was approved by the Council on National Certification for a pilot period of six months starting in January 2008.

• ‘Plain language’ consultants were engaged by CSMLS to review and revise all of the documentation that is provided to internationally-educated medical laboratory technologists about the prior learning assessment process. The consultants will also advise CSMLS staff on how to use plain language principles to develop new documentation. This project was made possible with the support of a grant from the Foreign Credential Recognition Program of Human Resources and Social Development Canada.

• Dr. Moira Grant made a presentation on prior learning assessment and credentialing of internationally-educated health professionals at the Canadian Institute on Health Information’s health human resources conference in December 2007.

• The Canadian Association of Schools of Nursing endorsed the costing model for clinical placements that was developed by Dr. Moira Grant and Kurt Davis. The model was first published in the 2004 CSMLS report, *Clinical Placements for Canadian Medical Laboratory Technologists: Costs, Benefits and Alternatives*.

Facts and Figures

**Research Grants Awarded in 2007**

$36,462, Health Canada
*Simulation-based Learning in Medical Laboratory Education: Current Perspectives and Practices*

$12,000, Health Canada
*Preliminary Study on Recruitment and Career Awareness Strategies*
(The grant was originally awarded to the Association of Canadian Community Colleges and the Collaborative Forum on Health Science Education. CSMLS was contracted by these associations to conduct the research.)

$58,570, Government of Ontario
*Investigation of Language Assessment Tools and Benchmarks Necessary for Success for Internationally Educated Medical Laboratory Technologists*

$138,172, Foreign Credential Recognition Program of Human Resources and Social Development Canada
*CSMLS Internationally-Educated Medical Laboratory Technologists Communications Project*
CSMLS Leadership Forum
May 10-13, 2007 Hamilton Ontario

“A well-organized and thought-out conference”

“Learned from every session – excellent program!”

“This was the best Congress I have attended in 32 years”
From the heart-rending opening keynote address of Stephen Lewis, to Nick Bontis’s sensational close, delegates agreed that they had experienced something special at the CSMLS Leadership Forum.

As one attendee stated, it was a “brave and daring” move to offer a program devoted to leadership and personal development. No doubt the time was right: most sessions were well-attended, with some sessions – in particular those workshops focusing on management skills – selling out.

A highlight of the Forum’s social program was the ‘Body Art’ silent auction held at the President’s Reception at the Art Gallery of Hamilton. ‘Body Art’ is a collection of 15 art-photomicrographs of stained specimen samples, produced and donated by Bryan Hewlett. Over $1000 was raised by the auction to support the World Medical Laboratory Development Fund.
AUDITOR’S REPORT

To the Members of Canadian Society for Medical Laboratory Science

The accompanying summarized consolidated balance sheet and summarized consolidated statement of operations and cash flow are derived from the complete consolidated financial statements of Canadian Society for Medical Laboratory Science as at December 31, 2007 for the year then ended on which we expressed an opinion without reservation in our report dated February 6, 2008. The fair summarization of the complete consolidated financial statements is the responsibility of management. Our responsibility, in accordance with the applicable Assurance Guideline of The Canadian Institute of Chartered Accountants, is to report on the summarized financial statements.

In our opinion, the accompanying consolidated financial statements fairly summarize, in all material respects, the related complete consolidated financial statements in accordance with the criteria described in the Guideline referred to above.

These summarized consolidated financial statements do not contain all the disclosures required by Canadian generally accepted accounting principles. Readers are cautioned that these consolidated statements may not be appropriate for their purposes. For more information on the Society’s financial position, results of operations and cash flows, reference should be made to the related complete financial statements.

Burlington, Ontario
February 6, 2008

Stevenson & Lehocki
Chartered Accountants
Licensed Public Accountants
### Summarized Consolidated Balance Sheet

As at December 31 2007 2006

<table>
<thead>
<tr>
<th>Assets</th>
<th>2007</th>
<th>2006</th>
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<td>Current assets</td>
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<tr>
<td>Cash and short-term</td>
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<td>investments</td>
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<td>Accounts receivable</td>
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<td>Inventory</td>
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<td>Investments - Restricted</td>
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<td>Funds</td>
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<td>Capital assets</td>
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<td>$5,614,473</td>
<td>$5,604,558</td>
</tr>
</tbody>
</table>

| Liabilities and Net Assets  |            |            |
| Current liabilities        |            |            |
| Accounts payable and       | $83,555    | $150,529   |
| accrued liabilities        |            |            |
| Prepaid revenue             | 780,005    | 860,360    |
| Current portion of         | 21,989     | 18,333     |
| obligations under          |            |            |
| capital lease              |            |            |
|                            | 885,549    | 1,029,222  |
| Obligations under          | 121,768    | 143,757    |
| capital lease              |            |            |
| PROVISIONS FOR             |            |            |
| FUTURE CONGRESS            |            |            |
| LOSSES                     | 100,000    | 100,000    |

| Net Assets                  |            |            |
| Invested in capital assets  | 1,456,127  | 1,503,416  |
| Internally restricted       | 1,073,131  | 1,114,193  |
| Externally restricted       | 379,376    | 375,521    |
| Unrestricted                | 1,598,522  | 1,338,449  |
|                            | 4,507,156  | 4,331,579  |
|                            | $5,614,473 | $5,604,558 |

### Summarized Consolidated Statement of Operations

Year ended December 31 2007 2006

<table>
<thead>
<tr>
<th>Revenues</th>
<th>2007</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross fees received</td>
<td>$2,165,959</td>
<td>$2,195,405</td>
</tr>
<tr>
<td>Less: Provinces' share</td>
<td>(285,202)</td>
<td>(286,051)</td>
</tr>
<tr>
<td>Less: Professional Liability Insurance premiums</td>
<td>(141,171)</td>
<td>(175,490)</td>
</tr>
<tr>
<td>National membership fees</td>
<td>1,739,586</td>
<td>1,733,864</td>
</tr>
<tr>
<td>Certification</td>
<td>643,590</td>
<td>508,912</td>
</tr>
<tr>
<td>Continuing education</td>
<td>172,847</td>
<td>125,596</td>
</tr>
<tr>
<td>Communication</td>
<td>59,016</td>
<td>60,925</td>
</tr>
<tr>
<td>Investment income</td>
<td>126,714</td>
<td>102,577</td>
</tr>
<tr>
<td>Miscellaneous income</td>
<td>127,396</td>
<td>71,854</td>
</tr>
<tr>
<td></td>
<td>2,869,149</td>
<td>2,603,728</td>
</tr>
</tbody>
</table>

| Expenses                      |            |            |
| Administration                | 642,455    | 600,677    |
| Salaries and benefits         | 1,318,729  | 1,174,507  |
| Certification                 | 226,005    | 167,092    |
| Continuing education          | 136,675    | 62,757     |
| Communication                 | 279,699    | 260,899    |
| Marketing                     | 30,827     | 58,101     |
| Depreciation of capital assets| 107,146    | 110,580    |
|                            | 2,741,536  | 2,434,613  |
| Income - before other revenue | 127,613    | 169,115    |
| OTHER REVENUE                 | 47,964     | 26,718     |

| Excess of Revenues over       | $175,577   | $195,833   |
| Expenses                      |            |            |
### SUMMARIZED CASH FLOW STATEMENT

<table>
<thead>
<tr>
<th>Year ended December 31</th>
<th>2007</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CASH FLOWS FROM OPERATING ACTIVITIES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net income for the year</td>
<td>$175,577</td>
<td>$195,833</td>
</tr>
<tr>
<td>Items not requiring an outlay of cash</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Depreciation</td>
<td>107,146</td>
<td>110,580</td>
</tr>
<tr>
<td>Loss on disposal of capital assets</td>
<td>694</td>
<td>1,301</td>
</tr>
<tr>
<td><strong>Total Changes in non-cash working capital balances</strong></td>
<td>283,417</td>
<td>307,714</td>
</tr>
<tr>
<td>Accounts payable and accrued liabilities</td>
<td>(66,977)</td>
<td>48,464</td>
</tr>
<tr>
<td>Accounts receivable</td>
<td>(18,875)</td>
<td>(10,846)</td>
</tr>
<tr>
<td>Inventories</td>
<td>2,764</td>
<td>(18,766)</td>
</tr>
<tr>
<td>Prepaid expenses</td>
<td>9,802</td>
<td>(27,939)</td>
</tr>
<tr>
<td>Prepaid revenue</td>
<td>(80,355)</td>
<td>112,366</td>
</tr>
<tr>
<td><strong>Total Cash flows from operating activities</strong></td>
<td>(153,641)</td>
<td>103,279</td>
</tr>
<tr>
<td><strong>CASH FLOWS FROM INVESTING ACTIVITIES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Additions) to capital assets</td>
<td>(42,217)</td>
<td>(85,090)</td>
</tr>
<tr>
<td>Decrease (increase) in loans and investments</td>
<td>37,208</td>
<td>(13,238)</td>
</tr>
<tr>
<td>Proceeds on disposal of capital assets</td>
<td>0</td>
<td>30,696</td>
</tr>
<tr>
<td><strong>Total Changes in cash and equivalents during the year</strong></td>
<td>(5,009)</td>
<td>(67,632)</td>
</tr>
<tr>
<td><strong>CASH FLOWS FROM FINANCING ACTIVITIES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advances of long term and callable debt</td>
<td>0</td>
<td>60,709</td>
</tr>
<tr>
<td>(Repayment) of long term and callable debt</td>
<td>(18,333)</td>
<td>(60,925)</td>
</tr>
<tr>
<td><strong>Changes in cash and equivalent during the year</strong></td>
<td>(18,333)</td>
<td>(216)</td>
</tr>
<tr>
<td><strong>Cash and equivalents, beginning</strong></td>
<td>2,264,515</td>
<td>1,921,370</td>
</tr>
<tr>
<td><strong>Cash and equivalents, ending</strong></td>
<td>$2,370,949</td>
<td>$2,264,515</td>
</tr>
<tr>
<td>Represented by:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash</td>
<td>$425,867</td>
<td>$877,456</td>
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<tr>
<td>Term deposits</td>
<td>1,945,082</td>
<td>1,387,059</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$2,370,949</td>
<td>$2,264,515</td>
</tr>
</tbody>
</table>

### NOTES TO THE SUMMARIZED CONSOLIDATED FINANCIAL STATEMENTS

December 31, 2007
See accompanying notes

1. **SIGNIFICANT ACCOUNTING POLICIES**

These consolidated financial statements have been prepared in accordance with Canadian generally accepted accounting principles (GAAP) and include the accounts of World Medical Laboratory Development Fund (WMLDF), which is controlled by the Canadian Society for Medical Laboratory Science.

2. **COMPARATIVE FIGURES**

The comparative figures have been reclassified where necessary to conform to the presentation adopted in the current year.
### 2007 Gross Operating Expenses

- **Communications**: 16.5%
- **Certification**: 14.8%
- **Continuing Education**: 10.9%
- **Meetings**: 10.2%
- **Marketing**: 2.8%
- **Office Premises**: 4.2%
- **Administration & Support**: 40.6%

### MEMBERSHIP DISTRIBUTION REPORT - 2007

<table>
<thead>
<tr>
<th>Membership Type</th>
<th>NL</th>
<th>PE</th>
<th>NS</th>
<th>NB</th>
<th>QC</th>
<th>ON</th>
<th>MB</th>
<th>SK</th>
<th>AB</th>
<th>BC</th>
<th>NT</th>
<th>NU</th>
<th>YT</th>
<th>CDN</th>
<th>US and Foreign</th>
<th>2007 TOTAL</th>
<th>2006 TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certified Active RT, ART, FCS, MLS</td>
<td>409</td>
<td>106</td>
<td>926</td>
<td>655</td>
<td>869</td>
<td>2877</td>
<td>904</td>
<td>580</td>
<td>1401</td>
<td>2327</td>
<td>23</td>
<td>7</td>
<td>19</td>
<td>11103</td>
<td>197</td>
<td>11300</td>
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<tr>
<td>Certified Inactive &amp; Affiliate Inactive</td>
<td>9</td>
<td>2</td>
<td>42</td>
<td>9</td>
<td>92</td>
<td>231</td>
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<td>2</td>
<td>0</td>
<td>3</td>
<td>707</td>
<td>107</td>
<td>814</td>
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<td>Affiliate (Reg. Bodies)</td>
<td>0</td>
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<td>18</td>
<td>0</td>
<td>3</td>
<td>20</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>47</td>
<td>0</td>
<td>47</td>
<td>61</td>
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<tr>
<td>Certified Retired (Complimentary)</td>
<td>0</td>
<td>3</td>
<td>11</td>
<td>13</td>
<td>21</td>
<td>71</td>
<td>14</td>
<td>17</td>
<td>12</td>
<td>46</td>
<td>0</td>
<td>0</td>
<td>208</td>
<td>11</td>
<td>219</td>
<td>219</td>
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<tr>
<td>Certified Retired (Paid Fees)</td>
<td>6</td>
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<td>30</td>
<td>6</td>
<td>13</td>
<td>50</td>
<td>22</td>
<td>15</td>
<td>14</td>
<td>37</td>
<td>0</td>
<td>0</td>
<td>194</td>
<td>4</td>
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<td>Honorary</td>
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<td>1</td>
<td>8</td>
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<td>0</td>
<td>0</td>
<td>16</td>
<td>0</td>
<td>16</td>
<td>15</td>
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<tr>
<td>Honorary - Affiliate</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>3</td>
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<td>14</td>
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<tr>
<td>Students</td>
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<td>3</td>
<td>40</td>
<td>34</td>
<td>149</td>
<td>180</td>
<td>52</td>
<td>31</td>
<td>43</td>
<td>83</td>
<td>1</td>
<td>0</td>
<td>622</td>
<td>1</td>
<td>623</td>
<td>606</td>
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<tr>
<td>Lab Assistant Active</td>
<td>8</td>
<td>1</td>
<td>78</td>
<td>36</td>
<td>1</td>
<td>97</td>
<td>13</td>
<td>17</td>
<td>70</td>
<td>45</td>
<td>1</td>
<td>0</td>
<td>367</td>
<td>0</td>
<td>367</td>
<td>284</td>
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<tr>
<td>Lab Assistant Inactive</td>
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<td>1</td>
<td>6</td>
<td>3</td>
<td>0</td>
<td>48</td>
<td>1</td>
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<td>5</td>
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<td>0</td>
<td>0</td>
<td>80</td>
<td>0</td>
<td>80</td>
<td>68</td>
<td></td>
</tr>
<tr>
<td>Associate Non-Certified</td>
<td>5</td>
<td>0</td>
<td>6</td>
<td>3</td>
<td>9</td>
<td>132</td>
<td>18</td>
<td>3</td>
<td>17</td>
<td>23</td>
<td>0</td>
<td>2</td>
<td>218</td>
<td>1</td>
<td>219</td>
<td>137</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>444</td>
<td>117</td>
<td>1157</td>
<td>763</td>
<td>1157</td>
<td>3717</td>
<td>1077</td>
<td>698</td>
<td>1667</td>
<td>2718</td>
<td>27</td>
<td>9</td>
<td>23</td>
<td>13574</td>
<td>321</td>
<td>13895</td>
<td></td>
</tr>
</tbody>
</table>

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**Note:** The table shows the distribution of membership categories for the year 2007, with a comparative view to 2006.
2007 committees

Council on National Certification
Heather Autio, (Chair)
Wendy Bryan, NS
Kimmerly Deydey, SK
Beverlee Haas, MB
Francine Lanciallaut-Lun (Board Rep.)
Tabata Malo, QC
Jocelyn Miller, NL
Janet Reid, NB
Valerie Robinson, PE
Shelley Tiffen, BC
Tania Toffner (Panel rep)
Judith Welke, AB
Lynn Yawney, ON

Exam Panel
General
Carol Cadrain, (Chair)
Bryan Hewlett, ON
Dr. Gaston Lalumière, QC
Jennifer Mak, BC
Viki Massey, ON
Florentino Roque II, AB
Tania Toffner, ON
Christopher Ward, AB
Corie Warkentin, MB

Cytology
Rhonda Birse, (Chair)
Denyse Gauthier, QC
Shawn Ingersoll, NB
Charlene Kulak, AB
Dr. Thomas Thomson, BC
Susan Weber-Gowans, SK
Tamar Webster, ON

Clinical Genetics
Carlos Pereira, (Chair)
Camille Jackson, AB
Rhonda Klock, AB
Ivan Miller, BC
Corey Murray, NL
James Renouf, NL
Dr. Marsha Speevak, ON

Lab Assistants
Eva Walker, (Chair)
Marilyn Scutt, (co-chair)
Debra Andrew, BC
Lyle Malynyk, MB
Carol Mealey, NL
Richard Schulze, AB

Diagnostic Cytology Competency Profile Review Committee
Carol Cadrain (Chair)
Rhonda Birse, ON
Bessie Carydis, ON
Cori-Ann Greene, BC
Susan McRae, ON
David Moore, NB
Shannon Nardin, AB
Michael Pronk, NS
Tamar Webster, ON

Marketing & Communications Committee
Susan Atkinson, (Chair)
Foud Abbassi, BC
Angelina Beaton, NS
Patricia Anne Brown, SK
Bernard Hartung, ON
Karen Heath, AB
Carolyn Kamphuis, PE
Michelle Levesque, NB
Anne-Marie Martel, QC
Corey Murray, NL
Bill Younger, MB

National Advocacy Council
Reuben Noseworthy, (Chair)
Robin Power, (Board Rep.)
Sonja Chamberlain, AB
Monique Collette, NB
Ankie Fisher, NS
June Hynes, NL
Tammy Ottenbreit, SK
Debbie Provencher, QC
Rosalie Richard, PE
Linda Schroeder, MB
Lynn Simpson, BC
Irene Sottile, ON

National Regulatory Council
Reuben Noseworthy, (Chair)
Robin Power (Board Rep.)
Sonja Chamberlain, AB
Monique Collette, NB
Ankie Fisher, NS
Helmut Friesen, MB
Patrick Mercuri, ON
Tammy Ottenbreit, SK
Debbie Provencher, QC

Professional Development Committee
Shelby Giesbrecht, (Chair)
Lynn Farkas, SK
Tammy Hardie, MB
Lydia Hodgson, AB
Rene Maier, BC
Ed Miles, NS
Linda Moran-Ferron, ON
Michele Perry, PE
Colin Power, NL
Claudette Ptasznik, NB
Victoria Zaine, QC
# CSMLS Staff

**Office of the Executive Director**
- Michelle Everets, Executive Assistant, Meetings and Events
- Lisa Low, Executive Assistant
- Paul Pereira, Information Technology Administrator

**Certification**
- Christine Nielsen, Director
- Rosemary Baptista, Customer Service Representative
- Kim Burke, Administrative Assistant
- Lynn Policelli, Coordinator
- Michelle Verburg, Executive Assistant
- Cheryl Waldron, File Clerk/Mail Room

**Communication**
- Alison McLennan, Director, Communication
- Richard Hockney, Coordinator, Publications
- Claudia Niemiec, Administrative Assistant, Bilingual Communications

**Continuing Education and Professional Development**
- Sandra Wagner, Director
- Lucy Agro, Coordinator

**Marketing**
- Melodie Campbell, Director

**Membership Services and Administration**
- Dave Dion, Director
- Sandy Mason, Executive Assistant, Accounting
- Caron Seabrook, Administrative Assistant

**Research**
- Dr. Moira Grant, Director

# 2007 Board of Directors

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>Robin Power</td>
</tr>
<tr>
<td>Past President</td>
<td>Reuben Noseworthy</td>
</tr>
<tr>
<td>President-Elect</td>
<td>Susan Atkinson</td>
</tr>
<tr>
<td>Vice President</td>
<td>Shelby Giesbrecht</td>
</tr>
<tr>
<td>Bilingual Director</td>
<td>Francine Lanciault-Lun</td>
</tr>
<tr>
<td>Director</td>
<td>Colleen Gibson</td>
</tr>
<tr>
<td>Director</td>
<td>Regina Zver</td>
</tr>
<tr>
<td>Director</td>
<td>Kate Gagliardi</td>
</tr>
<tr>
<td>Director</td>
<td>Tricia VanDenakker</td>
</tr>
<tr>
<td>Director</td>
<td>Rachelle Kingsler</td>
</tr>
<tr>
<td>Director</td>
<td>Colleen Moran</td>
</tr>
</tbody>
</table>