ANNUAL REPORT
2014
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Who We Are

The Canadian Society for Medical Laboratory Science (CSMLS) is the national certifying body for medical laboratory technologists (MLTs) and medical laboratory assistants (MLAs), and the national professional society for Canada's medical laboratory professionals. We are a not-for-profit organization that promotes and maintains a nationally accepted standard of medical laboratory technology and protects the professional identity and interests of the medical laboratory profession.

We conduct national certification exams for those who meet the prescribed standards. We also conduct Prior Learning Assessments (PLA) for internationally educated professionals. Once members are certified, CSMLS offers professional development and continuing education programs to help members update their skills and knowledge and achieve their professional goals.

Our Members

Medical laboratory professionals play a vital role in Canada’s health care system. With technical expertise, they provide the analysis of accurate, life-saving laboratory results that guide the diagnosis and treatment of patients. Our members are proud and passionate about their valuable contributions to patient care.

The Professions

Through education and experience, medical laboratory professionals can specialize in several components of the profession. The professions we serve include:

- **Medical Laboratory Technologists**
  - Using a variety of instruments, they analyze blood samples, tissue and other body fluids to provide results to primary health care practitioners. MLTs can practice in a number of speciality areas including: Clinical Chemistry, Microbiology, Hematology, Transfusion Science and Histotechnology.

- **Medical Laboratory Assistants**
  - Working under the supervision of a medical laboratory technologist, they often collect patient samples and perform pre-analytical tasks.

- **Cytotechnologists**
  - Analyzing cellular changes, they can determine the presence of specific diseases. Mostly through the use of slides under a microscope, they are able to detect cellular based infection and diseases, such as cancer.

- **Clinical Genetics Technologists**
  - Using a variety of instruments, they analyze and detect changes or abnormalities in chromosomes and DNA which are determinants of genetic disease.
Vision
Excellence in Medical Laboratory Science

Mission
To advance the profession through certification, education and advocacy.
We will work at fulfilling this mission statement through four key areas:

• Lead and partner to advance patient safety
• Engage and empower the profession
• Enhance organizational capacity
• Expand our sphere of influence

Strategic Plan
• Enhancing Regulatory & Association Functions
  We are focusing on best practices in certification and prior learning assessment,
  while evaluating satisfaction from external stakeholders. We are increasing value
  for members through new affinity programs, research and advocacy efforts. We
  continually analyze member recruitment and retention strategies to sustain and
  grow the Society.

• Enhance our Provincial Relationships & Support our Provincial Partners
  We recognize the importance of relationships and are actively looking for
  opportunities to support our members in areas such as education, networking, and
  advocacy at the local level.

• Create Communities of Practice
  We have created and launched an online forum exclusively for CSMLS members.
  Our goal is to create informal learning opportunities to provide a place to tap into
  the collective wisdom and experience of the profession.

• Enhance Relationships with the Education Community
  Educators are an important element to the success of future medical laboratory
  professionals. They teach, shape and encourage future leaders to join the professional
  body. We are working to enhance the relationships with the education community.
Together, we present the 2014 annual report for the Canadian Society for Medical Laboratory Science. This report highlights the Society’s operational successes of the past year through the dedicated work of our Board of Directors and staff. These milestones are presented in this report because they were pivotal in moving the Society towards fulfilling our mission and vision.

As proud as we are of the milestones from this year, they do not truly reflect the work done by our volunteers. The CSMLS is only successful because of the hundreds of dedicated women and men from within the medical laboratory community that give their time, expertise and talents. We want to take this opportunity to recognize those who; create our exam questions and set exam scores, lend their experience to create and assess courses, provide feedback through surveys and focus groups, and give their time to sit on committees, task forces and working groups. For this and everything in between – we sincerely thank you.

At the Society, we are fortunate to work with these volunteers and it reminds us of why we are here. We are here for each and every medical laboratory professional in Canada, and for those wanting to join the field. In 2014, our mandate remained focused on our members and attracting future members. Our projects, programs, improvements and changes were always about creating a better membership experience.

We understand that goal is a work in progress and as we look to our future, we are committed to keep persevering.

Christine Nielsen
Chief Executive Officer

Natalie Campbell
2014 – CSMLS President
2014 CSMLS Staff

**Office of the CEO**
Christine Nielsen *Chief Executive Officer*
Lisa Low *Executive Assistant*

**Certification & Prior Learning Assessment**
Bessie Carydis *Director*
Jennifer Barrett *Administrator*
Kim Burke *Executive Assistant*
Dayna Travale *Administrator*
Lorna Zilic *Manager*

**Finance & Membership / Learning Services**
Joe Davies *Financial Controller*
Lucy Agro *Administrator, Learning Services*
Hope Brown *Administrator, Member Services*
Katherine Coles *Human Resources & Operations Coordinator*
Diana Dwerryhouse *Translator*
Suzanne Gratton *Bilingual Customer Service & Reception*
Nolan Grupe *Database Analyst*
Josie McMullen *Administrator, Member Services*
Michele Perry *Manager, Learning Services*

**Marketing & Communications**
Michael Grant *Director*
Cathy Bouwers *Communications Specialist*
Norah Langham *Executive Assistant*
Natalie Marino *Marketing Specialist*
Claudia Niemiec *Communications Associate, Generalist (on leave)*
Ashley Rego *Marketing & Communications Associate*
Joel Tersigni *Web Developer & IT Coordinator*

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**Volunteer Spotlight**

**Viki Massey**
**Years of Volunteer Service:** Over 25 years
**Recent Volunteer Work:**
- Exam Panel (Microbiology)
- Item Writing Workshops
- Online Self-Assessment Tools Taskforce
- Angoff Participant
- General MLT Competency Profile Review Taskforce

**Why volunteering for CSMLS is important to me:**
I am proud of my chosen profession and volunteering for the CSMLS provides me with an opportunity to contribute to and support my professional community while meeting, working and networking with many other dedicated professionals. To summarize, I volunteer because....
I love the work!

**Anne Rigg**
**Years of Volunteer Service:** 8 years
**Recent Volunteer Work:** Course Assessor

**Why volunteering for CSMLS is important to me:**
With my background in laboratory technology, teaching, and a Masters in Adult Education, volunteering within Learning Services was a perfect opportunity for me to assist other members. Course assessing provides me with a unique learning experience as it allows me to browse through courses and review interesting material.
Volunteer Committees

The CSMLS is an organization dependent on the contributions of our members. We extend our gratitude to the devoted volunteers who have contributed their time, knowledge and expertise toward the betterment of the medical laboratory profession. Volunteer commitments are varied, but each are valuable.

Authors & Instructors
Sherri Beckner
Paul Bradbury
Sue Bradley
Zoe Brooks
John Chapman
Eric Ching
Lisa Denesiuk
Rosemary Drisdelle
Denise Evanovitch
Christine Frantz
Bharat Gandhi
Darcy Gara
Kate Gagliardi
John Hartt
Randi Hayes
Mario Hemens
Eleanor Hooley
Paul Hutchinson
Jennine Kafka
Melissa King
Luc Lafrance
Sharon Leal
William McTaggart
Wendy Mellen
Subhash Mohan
Pamela Quinsey
Ofelia Ribeiro
Gene Shematek
Helen Smith
Linda Stang
Maryanne Stewart
Meng-Kee Tan
Masaye Tanaka
Wayne Wood

Council on Government & Public Relations
Fouad Abbassi
Rania Elhalabi
Louise Farrar
Michelle Gosselin
Janice Jones
Blanca McArthur
Colin Power
Gillian Rimmer
Del Windrum

LABCON2014
Terry Akister
Judy Archer
Nancy Korte
Mary Kratchmer
Marcela Navarro
Twyla Pearce
Megan Williams

Ethics Taskforce
Sharon Leal
Greg Hardy
Kathleen Gagliardi
Nancy Banks

Exam Panel
General Medical Laboratory Technologists
Samantha Kimball
Patricia Ludlow
Josh MacDonald
Viki Massey
Kathleen Thompson
Jodi Thompson
Melissa Veinot
Chris Ward
Svitlana Yaremenko

Diagnostic Cytology
Brandy Callahan
Kathy Chorneyko
June Dufresne
Shawn Ingersoll
Kelly Marshall
Melissa Walsh
Tamar Webster

General MLT Competency Review Taskforce
Ismaila Amusat
Marcene Campbell
Joseph Costello
Ariane De Montigny
Randi-Lynn Hayes
Mary Kratchmer
Viki Massey

Learning Services Course Assessors
Deb Andrew
Douglas Bartlett
Susan Findlater
Mark Hawkins
Claire Hilscher
Chris Hirtle
Glen Johnston
Lydia Keczem
Marion McChesney
Anne Rigg
Marion Smith
Kenneth Wong

Nominating Committee
Heather Auto
Rhonda Birse
Shelby Giesbrecht
Patricia Noel
Colin Power
Tricia VanDenakker

Professional Standards Council
Malcolm Ashford
Janelle Bourgeois
Adam Chrobak
Alain Collette
Larissa Fadish
Louise Farrar
Janice Jones
Maria Klement
Pat Mercuri
Colin Power
Del Windrum
Svitlana Yaremenko

Scientific & Education Review Committee
Maurice Goulet
Maxine Adams – Small
Isaac Aliche
Susan Atkinson
Nancy Bergeron
Elsie Chan
Vanessa Chan
Denise Evanovitch
Kate Gagliardi
Darcy Gara
Darlene Gilby
Bassima Hammoud
Scott MacDonald
Heather Malcolm
Kelly Marshall
Roberta Martindale
Marianne McCashin
Jennifer McPhee
Kelly Ann McPherson
Subhash Mohan
David Moore
Krystle Murl
Diane Perry
Audrey Saxton
Meng-Kee Tan
Mark Torchia
Frederick Wong
Kenneth Wong
Grants, Scholarships & Awards

CSMLS is proud to offer several awards and scholarships to those who have shown excellence in their profession, to help members continue their professional development, and to aid students in their education. Congratulations to the recipients of our 2014 Grants, Scholarships and Awards.

Distinguished Fellowship Award
Linda Crawford

Honorary Membership Award
Kathleen Gagliardi

Barbara Santalab-Rickey Memorial Award
Suzanne Cho

Leaders of Tomorrow LABCON Grant
Patricia Daduica (MLT)
Jana Keogh (Student)
Jennifer O’Neil (Student)
Ana Marie Wong (MLA)
Abdullah Zareh (MLT)

Founders’ Fund Award- MLT
Heba Abukhadra
Ismaila Amusat
Camille Bailer
Deborah Bonderud
Kelly Bradley
Eugene Cheung
Jennifer Enman
David Gibbs
Helene Goulding
Melissa Sereda
John Soltys
Paula Steeves

The E.V. Booth Scholarship
Yu-Wei Roy Chen

Founders’ Fund Award – MLA
Samantha Tanner

Siemens Canada Limited Student Scholarship Award
Candace Fowler
Ashley Olson

CSMLS Student Scholarship
Aasiya Shaikh
Kristen Wagner
Office of the CEO

The Chief Executive Officer’s overall responsibility is for the fiscal and operational well-being of the Society. This role is also integral to remaining aware of the current issues within the medical laboratory field, while advocating on behalf of the members and the medical laboratory profession. As part of this advocacy, our CEO participates on many national committees to ensure our voice is heard.

Research
Alternate Careers

With funding from Health Canada, the CSMLS researched and identified potential alternative careers for internationally educated medical laboratory technologists looking for meaningful employment. As a result of this research, the CSMLS developed and launched a new website to host resource information on Alternate Careers.

The website lists 11 potential career options for those looking for options similar to the medical laboratory field, but without regulation or licensure to enter the field. We believe this website will be a valuable tool for immigration services, individuals looking for employment while going through the prior learning assessment process, or for those looking for work outside of the medical laboratory field.

Self-Directed Bridging Program

The Self-Directed Bridging program provides internationally educated medical laboratory technologists (IEMLTs) with tools and resources to help guide their learning plan requirements. A learning plan addresses gaps in education or experience in order to successfully write the certification exam. Development of the program began in 2011, with funding by Employment and Social Development Canada, until March 2015.

95% of respondents felt as though the content on the website was easy to read and understand
91% of respondents felt that the site is helpful for people to plan their careers in Canada.
Governance

Not-for-Profit Corporations Act

In 2011, the Canadian federal government replaced part of the Canada Corporations Act with the new Canada Not-for-Profit Corporations Act (NFPCs). The Act had some considerable changes, along with establishing a new set of rules which are more modern and suitable for today’s not-for-profit organizations. Since then, CSMLS Board of Directors and staff worked toward complying with these changes in order to continue our status as a not-for-profit society. The important work fell to the Legislation Committee; a sub-committee of the Board of Directors. We also leveraged the expertise of an experienced association management consultant, supplemented by expert legal counsel. The committee reviewed all current Bylaws and made recommendations to comply with the NFCA. At the Annual General Meeting in June, the final Bylaws were voted on by membership. In July, CSMLS received notice of approval by Industry Canada to continue as a not-for-profit corporation and the Bylaws have been accepted.

Position Statements

CSMLS members are able to turn to the Society for insight and opinions on industry issues in the form of position statements. They are created by the Board of Directors as an outward statement on behalf of the Society on industry trends, health and safety concerns, patient safety or environmental issues. This year, the Board of Directors released four new position statements; Maintenance of Competence, Quality Work Life Environments for Medical Laboratory Professionals, Medical Laboratory Responsibility to the Environment and Diversity.

Standards of Practice

After extensive development, the CSMLS launched new national Standards of Practice for both medical laboratory technologists and medical laboratory assistants. The Board of Directors feel these documents are important not just to practicing members, but to the profession as a whole. The effort and resources dedicated to creating these documents were valuable as they provide current and meaningful standards for professional practice and behaviour in the field.

CEO Activities

Our CEO continues to be recognized as an expert in policy, process and knowledge transfer on many issues, such as Pan Canadian standards in Certification and Prior Learning Assessment, tools to improve the EMLT experience and evidence-informed decisions in associations. Christine Nielsen has been requested to speak and facilitate meetings, think tanks, program advisory committees, conferences and symposia for our profession and other professions including regulators, and governments. Our voice is being heard! Key events include:

- Employment Skills Development Canada’s Panel on Employment Integration Challenges for Newcomers
- Leaders’ Roundtable on Immigration (The Conference Board of Canada)
- Alternate Career Roundtable
- Metropolis Conference
- Canadian Network of Associations of Regulators (CNAR) Conference
- Maritech
- Canadian Association of Allied Health Programs Conference
- International Federation of Biomedical Laboratory Science (IFBLS) Conference
The Certification and Prior Learning Assessment team, through subject matter experts, develop and maintain the nationally accepted standard (national competency profile) for medical laboratory technology (MLT) and medical laboratory assistant (MLA). The CSMLS certifies medical laboratory professionals in four disciplines: general medical laboratory technology, diagnostic cytology, clinical genetics and medical laboratory assistant. For internationally educated medical laboratory technologists who wish to become certified, we offer a prior learning assessment (PLA) program which evaluates education, training and work experience and compares it to the standard for entry level Canadian trained MLTs. We are committed to providing fair, impartial and transparent processes while upholding the national standard and maintaining exam integrity.

Exam Reporting
The Professional Standards Council (PSC) implemented program performance reporting improvements with the October 2014 exam. These changes allow for a more transparent process, to assist educational programs with self-evaluations and help unsuccessful exam candidates plan for their future success. Keeping in line with best practices, unsuccessful exam candidates will now receive the exam Angoff score and their exam score, while successful exam candidates will receive the exam Angoff score.

Advanced Registered Technology Program
In 2014, we wrapped up the CSMLS advanced registered technology (ART) certification program. The decision to discontinue the ART was made by the CSMLS Board of Directors in 2010. Based on member feedback and low enrollment in the program, CSMLS started to phase out the ART certification program. ART candidates already in the process were required to complete the program by December 31, 2014. In October 2014, three candidates successfully passed their oral exams and we issued the final certificates of the program.

Medical Laboratory Assistant Certification
The CSMLS believes that obtaining Canadian Medical Association (CMA) accreditation for Medical Laboratory Assistant (MLA) programs enhances the credibility of educational programs and demonstrates that the program meets rigorous national standards. More employers understand the value of certified MLAs in the workforce and in many cases, are requiring CSMLS certification for employment. Eligibility to write the CSMLS MLA certification exam is restricted to graduates of a CMA accredited program or equivalent through Prior Learning Assessment.

MLA Exam Candidates

<table>
<thead>
<tr>
<th>Year</th>
<th>General MLT</th>
<th>Diagnostic Cytology</th>
<th>Clinical Genetics</th>
<th>MLA</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>683</td>
<td></td>
<td></td>
<td>936</td>
</tr>
<tr>
<td>2013</td>
<td>660</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2012</td>
<td>709</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>569</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In 2014, we increased visits to MLA programs, presenting students across Canada with the facts about certification, the profession, and exam preparation. We attended career fairs and conferences and collaborated directly with educators. Our efforts on this initiative, combined with a targeted marketing campaign, led to an overall increase in MLA exam candidates of almost 42% since 2012.

Competency Profile Review - General MLT
Under the guidance of the Professional Standards Council, CSMLS regularly reviews and updates the Competency Profiles for each of the four medical laboratory disciplines. This is to ensure competencies are appropriate and current in the field. This year we reviewed the competency profile for General Medical Laboratory Technology. The draft was approved by the CSMLS Board of Directors in December 2014, and then submitted to the CMA in early February 2015 for approval. Once approved, the new Competency Profile will be posted on the CSMLS website and the implementation date will be negotiated with CMA and educational programs.
Marketing & Communications

The Marketing and Communications team works to increase the profile of CSMLS and medical laboratory professionals amongst the public, stakeholder groups, and within the lab community. Using various communication channels we look for creative approaches to engage our multiple audiences and enhance the overall member experience.

National Medical Laboratory Week: The Pocket Project

Each year CSMLS sponsors a special week to promote awareness and understanding of the role of medical laboratory professionals. To expand our audience, we created the Pocket Project. We sent custom designed pocket protectors to prominent Canadians and asked them to take a photo and engage with us on social media. Together they helped us reach over 541,925 online social media users.

Government Relations

Our advocacy agenda moved forward both nationally and locally. During our Lobby Day on Parliament Hill in Ottawa, CSMLS representatives met with over 45 Members of Parliament (MPs). The visit included a meet and greet with Minister of Health, Rona Ambrose.

As a follow-up, we arranged lab tours for MPs in their own ridings. The tours give MPs an in-depth look at the important work done in the lab and bring our issues closer to home. CSMLS staff joined three MPs on tours of their local hospital laboratories.

Member Recruitment

As part of our strategic plan, 2014 saw a determined focus on membership recruitment. One strategy targeted segments of our member base, determining their specific needs and building a marketing campaign to meet those needs.

Bylaw changes from the Ontario regulatory college in 2014, required medical laboratory technologists (MLTs) to obtain Professional Liability Insurance (PLI) in order to practice. Since CSMLS offers PLI to members, we targeted marketing collateral to practicing MLTs in Ontario, informing them of the benefits of a CSMLS membership, which includes a low cost option for PLI.

We reached out to educators and current medical laboratory assistant (MLA) members to be advocates for CSMLS MLA certification and membership. Understanding the value of certification was the key message shared broadly with students, employers and practicing MLAs. This campaign assisted the Certification and Prior Learning Assessment team with their outreach efforts.

Yearly MLA Membership - Canada

<table>
<thead>
<tr>
<th>Year</th>
<th>Membership</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>1576</td>
</tr>
<tr>
<td>2013</td>
<td>1399</td>
</tr>
<tr>
<td>2012</td>
<td>1296</td>
</tr>
<tr>
<td>2011</td>
<td>1081</td>
</tr>
<tr>
<td>2010</td>
<td>808</td>
</tr>
<tr>
<td>2009</td>
<td>656</td>
</tr>
<tr>
<td>2008</td>
<td>530</td>
</tr>
</tbody>
</table>
The Finance and Membership department oversees financial planning and management activities including budgeting and forecasting, reporting and compliance and risk management. We are also responsible for processing fees, providing customer service and ensuring accuracy in data collection and storage. As part of our services to members, we offer high quality professional development for laboratory professionals through our Learning Services.

Grants, Scholarships & Awards
With considerable input from the Grants, Scholarships and Awards Committee, as well as from stakeholders and CSMLS staff, we made changes to the program to make better use of funding, while increasing access, to ensure long-term viability of the program. In 2014, we announced the changes including: more relaxed application process, increased monies to the E.V. Booth fund and the International Founders’ Fund award, and the expanded eligibility for the Leaders of Tomorrow grant.

Learning Services
Infrastructure
Our Learning Services team used 2014 to evaluate our learning technology, research learning trends and evaluate new learning content management systems. Our needs had outgrown the E-Learning Society that was incorporated back in 2007, and it was time to upgrade. After extensive research, we moved forward with a vendor that was familiar, and had experience with, association-based continuing education. The new learning system carries a wide range of easy-to-use features making it a simple and effective learning resource for our members.

Partnerships
As part of our ongoing commitment to provide current and relevant professional development, we were pleased to expand our educational offerings. A new partnership with the Colorado Association for Continuing Medical Laboratory Education (CACMLE) gave CSMLS members access to their microbiology webinar series. A partnership with Siemens Canada Limited, Healthcare, Diagnostics Division allowed members access to their online education. These new relationships were just one way for us to expand our Learning Services courses to assist our members.

Database
In 2012, after a considerable investment of time and resources, CSMLS made a significant upgrade to our database system. Since the initial upgrade, we have continually analyzed the system’s functions and its alignment with our needs. As with any database system, ongoing updating is required and in 2014 we began researching and preparing for this process. The updated version of our database will allow for more efficient web-based services, making for a better online experience for members.

Member Satisfaction Survey Results
96% of respondents were satisfied with the level of customer service received from CSMLS
88% of respondents felt that the CSMLS representatives they dealt with were courteous and professional
69% of respondents had their issue/question resolved by the first person they spoke to
75% of respondents were very satisfied with the response time in aiding their issue/question

139 New Associate Non-Certified
446 New students
645 Newly certified MLT
460 Newly certified MLA
REPORT OF THE INDEPENDENT AUDITOR ON THE 2014 SUMMARY FINANCIAL STATEMENTS

To the Members of Canadian Society for Medical Laboratory Science

The accompanying summary financial statements, which comprise the summary balance sheet as at December 31, 2014, the summary statement of operations and summary cash flow statement for the year ended, are derived from the audited financial statements of Canadian Society for Medical Laboratory Science for the year ended December 31, 2014. We expressed an unmodified audit opinion on those financial statements in our report dated March 3, 2015.

The summary financial statements do not contain all the disclosures required by Canadian accounting standards for not-for-profit organizations. Reading the summary financial statements, therefore, is not a substitute for reading the audited financial statements of the Canadian Society for Medical Laboratory Science.

Management’s Responsibility for the Summarized Financial Statements

Management is responsible for the preparation of a summary of the financial statements in accordance with Canadian accounting standards for not-for-profit organizations.

Auditor’s Responsibility

Our responsibility is to express an opinion on the summary financial statements based on our procedures, which were conducted in accordance with Canadian Auditing Standard (CAS) 810, Engagements to Report on Summary Financial Statements.

Opinion

In our opinion, the summary financial statements derived from the audited financial statements of Canadian Society for Medical Laboratory Science for the year ended December 31, 2014, are a fair summary of those financial statements, in accordance with Canadian accounting standards for not-for-profit organizations.

Burlington, Ontario
March 3, 2015

Stevenson Bullock LLP
Chartered Professional Accountants
Licensed Public Accountants

Volunteer Spotlight

Mary Kratchmer
Volunteer Since: 2002
Recent Volunteer Work:
- LABCON2014 (Saskatoon)
- Board of Directors - Saskatchewan & Manitoba 2002-2004
- Provincial Council (SSMLT)

Why volunteering for CSMLS is important to me:
It always revitalizes my passion for the profession to get involved! All my experiences have been extremely positive and I have met some wonderful people along the way as well.

Kate Gagliardi
Years of Volunteer Service: 30 years
Recent Volunteer Work:
- Research Ethics Board
- Ethics Taskforce
- Continuing Education Instructor

Why volunteering for CSMLS is important to me:
Volunteering for CSMLS is volunteering for your laboratory professional community. As a volunteer, your contribution to the society is matched or surpassed by the terrific experience of being a volunteer. The gaps in opportunities in my job were completely filled by fantastic experiences as a CSMLS instructor, Board of Directors member, Chair for the CSMLS Leadership forum and other volunteer activities that occurred over the 30 years!
### SUMMARY BALANCE SHEET

As at December 31

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and short-term investments</td>
<td>$2,944,393</td>
<td>$2,327,944</td>
</tr>
<tr>
<td>Accounts receivable</td>
<td>149,151</td>
<td>125,000</td>
</tr>
<tr>
<td>Inventory</td>
<td>3,688</td>
<td>8,256</td>
</tr>
<tr>
<td>Prepaid expense</td>
<td>83,021</td>
<td>123,767</td>
</tr>
<tr>
<td><strong>Total Current assets</strong></td>
<td>$3,180,253</td>
<td>$2,584,967</td>
</tr>
<tr>
<td><strong>Investments – Restricted Funds</strong></td>
<td>1,394,068</td>
<td>1,381,557</td>
</tr>
<tr>
<td><strong>Capital assets</strong></td>
<td>1,529,915</td>
<td>1,587,755</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$6,104,236</strong></td>
<td><strong>$5,554,279</strong></td>
</tr>
</tbody>
</table>

| LIABILITIES AND NET ASSETS |            |            |
| Current liabilities |            |            |
| Accounts payable and accrued liabilities | $248,936 | $283,488 |
| Government remittances payable | 8,126 | 3,426 |
| Prepaid revenue | 1,757,274 | 1,653,916 |
| **Total Current Liabilities** | **2,014,336** | **1,940,830** |

| NET ASSETS |            |            |
| Invested in capital assets | 1,529,915 | 1,587,755 |
| Internally restricted | 961,952 | 952,092 |
| Externally restricted | 432,116 | 429,465 |
| Unrestricted | 1,165,917 | 644,137 |
| **Total Net Assets** | **$6,104,236** | **$5,554,279** |

### SUMMARY STATEMENT OF OPERATIONS

Year ended December 31

<table>
<thead>
<tr>
<th>REVENUES</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross fees received</td>
<td>$2,355,764</td>
<td>$2,328,881</td>
</tr>
<tr>
<td>Less: Provinces’ share</td>
<td>(217,715)</td>
<td>(171,080)</td>
</tr>
<tr>
<td>Less: Professional Liability Insurance premiums</td>
<td>(163,719)</td>
<td>(166,616)</td>
</tr>
<tr>
<td>National membership fees</td>
<td>1,974,330</td>
<td>1,991,185</td>
</tr>
<tr>
<td>Certification / PLA</td>
<td>1,218,774</td>
<td>1,075,220</td>
</tr>
<tr>
<td>Learning Services</td>
<td>146,528</td>
<td>154,954</td>
</tr>
<tr>
<td>Communications</td>
<td>70,811</td>
<td>50,869</td>
</tr>
<tr>
<td>Marketing</td>
<td>2,066</td>
<td>1,680</td>
</tr>
<tr>
<td>Research</td>
<td>17,873</td>
<td>19,863</td>
</tr>
<tr>
<td>LABCON income</td>
<td>263,829</td>
<td>334,489</td>
</tr>
<tr>
<td>Investment income</td>
<td>46,054</td>
<td>43,408</td>
</tr>
<tr>
<td>Miscellaneous income</td>
<td>69,286</td>
<td>66,903</td>
</tr>
<tr>
<td><strong>Total Revenues</strong></td>
<td><strong>$3,809,551</strong></td>
<td><strong>$3,738,571</strong></td>
</tr>
</tbody>
</table>

| EXPENSES |            |            |
| Administration and Overhead – General | 618,644 | 645,116 |
| Certification / PLA | 787,812 | 737,735 |
| Learning Services | 323,015 | 340,575 |
| Communications | 470,168 | 486,799 |
| Marketing | 195,313 | 253,023 |
| Research | 78,145 | 66,794 |
| Governance | 516,509 | 515,406 |
| LABCON | 254,254 | 265,757 |
| Amortization of capital assets | 101,751 | 103,584 |
| **Total Expenses** | **3,345,611** | **3,414,789** |

| Income – before other revenue | 483,940 | 323,782 |
| OTHER REVENUE | 12,511 | 19,925 |

| EXCESS OF REVENUES OVER EXPENSES | **$476,451** | **$343,707** |
**SUMMARY CASH FLOW STATEMENT**

Year ended December 31

**CASH FROM (TO) OPERATIONS**  

<table>
<thead>
<tr>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Received from services, dues, and fees $</td>
<td>3,780,618</td>
</tr>
<tr>
<td>Investment income</td>
<td>46,054</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>0</td>
</tr>
<tr>
<td>Paid for supplies and services</td>
<td>(1,433,091)</td>
</tr>
<tr>
<td>Wages and benefits</td>
<td>(1,607,456)</td>
</tr>
<tr>
<td>Building facility costs</td>
<td>(130,494)</td>
</tr>
<tr>
<td>Excess in Internally Restricted funds</td>
<td>9,860</td>
</tr>
<tr>
<td>Excess in Externally Restricted funds</td>
<td>2,651</td>
</tr>
<tr>
<td>Interest paid</td>
<td>(7,782)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$660,360</strong></td>
</tr>
</tbody>
</table>

**CASH FROM (TO) INVESTING ACTIVITIES**

<table>
<thead>
<tr>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Additions) to capital assets</td>
<td>(43,911)</td>
</tr>
<tr>
<td>Proceeds on disposal of capital assets</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>(43,911)</strong></td>
</tr>
</tbody>
</table>

**CASH FROM (TO) FINANCING ACTIVITIES**

<table>
<thead>
<tr>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Repayment) of long-term and callable debt</td>
<td>0</td>
</tr>
<tr>
<td><strong>Changes in cash and equivalents during the year</strong></td>
<td><strong>616,449</strong></td>
</tr>
<tr>
<td>Cash and equivalents, beginning</td>
<td>2,327,944</td>
</tr>
<tr>
<td>Cash and equivalents, ending</td>
<td>$ 2,944,393</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$2,944,393</strong></td>
</tr>
</tbody>
</table>

**Represented by:**

<table>
<thead>
<tr>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash $</td>
<td>789,256</td>
</tr>
<tr>
<td>Short-term investments</td>
<td>2,155,137</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$2,944,393</strong></td>
</tr>
</tbody>
</table>

**NOTE FROM THE FINANCIAL CONTROLLER**

In 2014, the CSMLS experienced an influx in revenue stemming from an increase in medical laboratory assistant (MLA) certification examinations and an increase in prior learning assessments performed. These two items made for a larger than expected revenue surplus in the 2014 budget.

As a not-for-profit, the CSMLS is committed to reinvesting budget surpluses back into membership services. The Board of Directors approved the use of the 2014 surplus towards the creation of a sustainable fund for the Leaders of Tomorrow grant. This fund will allow CSMLS to continue to recognize young leaders in the profession and invest in their professional development by sending them to LABCON for years to come.

Julie (Joe) Davies, BSc., CPA, CMA
Financial Controller