

# Employee Advocacy Workbook

# **SELF-ASSESSMENT**



**MAY 2023**

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## INTRODUCTION

The Employee Advocacy Workbook is a platform built to facilitate straightforward communication between public health laboratory bench scientists and supervisory staff, in an effort to address current workforce retention issues. The workbook is flexible and adaptable for different management structures at all levels. This self-assessment is a tool to help you identify work-related achievements and pain points. Use the insights gained to guide your self-advocacy efforts; present specific, prioritized changes to supervisors about what you need to make you a better, more satisfied employee.

Managers and supervisors can also complete a supervisor assessment workbook that focuses on their team as a whole. These workbooks are designed to be completed simultaneously, followed by a discussion between the supervisor and employee.



Find all advocacy tools for employees & supervisors

[APHL.org/Employee-Advocacy-Resources](https://aphl.org/Employee-Advocacy-Resources)

## Instructions

This workbook is designed for the Employee. The intent is not for the workbook to replace formal evaluations; fill out as few or many sections and questions as you see fit—it does not need to be completed in one setting or in its entirety. Take time to reflect and consider what benefits you most as an employee in your public health laboratory. If you feel comfortable, discuss your answers with your supervisor. Their workbook is structured similarly, but includes questions related to the team as a whole.

For the purposes of this workbook, “team” refers to your immediate work unit or those with whom you collaborate on a regular basis and “manager” refers to your direct supervisor. Some questions have a “Start/Stop/Continue” matrix for the answer field. Think of this format as a “New Year’s resolution;” for example: “This year, I would like to... **start** exercising, **stop** eating fast food and **continue** yoga classes.”

## Acknowledgments

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Name: \_\_\_\_\_

Date: \_\_\_\_\_

## ORGANIZATIONAL PROFESSIONAL DEVELOPMENT AND CAREER PATHWAYS

Use this table to outline your organization’s existing opportunities for professional development and career advancement. If you are not familiar with some of these opportunities, you can use this as a chance to talk with your supervisor and discuss these options. Not all of these may be possible or provided at your agency/laboratory. Your supervisor should be able to let you know if and where this information is. In the Process/Policy Location column, write where you would find this information if you wanted to look it up. In the Requirements column, list any requirements needed to pursue the opportunity. In the Initiator column, check who would start the process or discussion of that opportunity.

Opportunity	Process/Policy Location	Requirements	Initiator
<b>Performance-based awards</b>			Employee Supervisor
<b>Increased pay within current job classification</b>			Employee Supervisor
<b>Promotion to a higher job classification</b>			Employee Supervisor
<b>Tuition reimbursement</b>			Employee Supervisor
<b>Membership dues/ability to go to conferences</b>			Employee Supervisor
<b>Professional development</b>			Employee Supervisor
<b>Other:</b>			Employee Supervisor
<b>Other:</b>			Employee Supervisor

## RESPONSIBILITIES AND WORKLOAD

Brainstorm your current responsibilities and workload as well as new skills or techniques you would like to develop.

1. Do you feel overworked/under-worked/just the right workload?

2. Are there sufficient backups for your work?

3. How has your workload changed from last year?

4. Are there aspects of your current responsibilities that you would like to change?

Start	Stop

5. Identify any skills you feel are being underutilized:

6. Identify the skills or techniques you are interested in developing this year:

7. Other notes:

## TEAM DYNAMICS

Use this section to identify proactive ways to improve your team. Start by identifying what you and others bring to the group: Who can you go to with questions? Who do you rely on? If there are gaps in the overall expertise in the team, can you fill that gap or can you support someone else? No group is perfect, but improving the team environment can have positive impacts on your own job satisfaction.

### 1. Who on your team are the “go-to” people? What do you see as your “go-to” role?

Team Member	Area(s) or Expertise
Myself	

### 2. Are there any gaps in your team’s expertise that you would like to fill?

### 3. Are there any aspects of your team’s dynamic you wish to change? What aspects should continue? e.g., having a team lead, ways to resolve problems, receiving feedback, etc.

Start	Stop	Continue

**4. How could your team’s communication be more effective? What is your preferred form of communication?**

e.g., frequency, communication type, responsibility distribution, etc.

Type of Communication	Change

**5. Other notes:**

## PROFESSIONAL AND WORKPLACE ENGAGEMENT

Identify current projects or activities related to your profession you would like to pay special attention to or participate in.

1. Identify any “back-burner” projects you would like to revive in the coming year. How can you, the team and/or your manager help that happen?

2. Do your regular workplace responsibilities allow you to participate in committees, projects or other “extra-professional” activities? If no, what are the specific barriers to participation?

3. For activities during the standard workday, identify your top three choices to start participating in: Choose from the following categories: seminars/conferences, continuing education, cross training, meetings/conference, volunteering, or other.

1. \_\_\_\_\_ :

2. \_\_\_\_\_ :

3. \_\_\_\_\_ :

4. Identify any activities you want to participate in that occur outside the standard workday:

5. Identify any activities (social or professional) that you wish were available:

6. Other notes:

## MORALE AND JOB SATISFACTION

Use this section to reflect on the past year via guided but open-ended questions on different facets of workplace achievement. These answers can be as concise or as detailed as you feel necessary.

### 1. What part of your job brings you the most satisfaction?

e.g., a task, committee, project, etc.

### 2. What achievements are you most proud of from the past year?

Note: Not all will apply to every employee and/or agency.

a. Overall biggest achievement:

b. Publications/conference presentations:

c. Technical challenges:

d. Personal/career development:

e. Team contributions:

f. Other:



**3. Do your achievements align with what your supervisor and others recognize as your major achievements for the year? Why or why not?**

**4. Compared to last year, how has your job satisfaction changed?**

e.g., challenges, responsibilities, work-life balance

**5. Identify any unexpected or unusual challenges you have experienced (work-related or personal) that have affected your morale:**

**6. Other notes:**

## REWARDS AND RECOGNITION

Use this section to identify what rewards and types of recognition are most important to you. If you are comfortable sharing this with your supervisor, use it to spark discussion about your desires. Supervisors may not be able to provide or accommodate all requests, but the conversation can provide an opportunity to brainstorm ideas for acceptable and realistic rewards and recognition that may not have been thought of before.

1. What types of achievements do you believe are worth recognition?

2. What does meaningful recognition look like to you?

3. How does your team recognize and celebrate victories?

4. Rate how meaningful the following methods of recognition are to you:

Note: Not all of the following apply to or are available at every organization. Use N/A if the form of recognition is not applicable or available to your organization.

Recognition	Not Meaningful	Neutral	Very Meaningful	N/A
Verbal affirmation				
Time off award				
Leave early / late start				
One-time monetary award				
Other small gift				
Internal communication e.g., team-wide congratulations email				
Displays of Achievement in Public Place e.g., lobby, meeting, co-authorship, etc.				
Award certificate				
Appreciation social e.g., ice cream or pizza party, etc.				
Other:				
Other:				

5. Are there any new or different ways you or your team would like to be recognized?

6. Rate how important the following possible outcomes of increased recognition are to you:

Recognition	Not Important	Neutral	Very Important	N/A
Increased opportunities for leadership activities				
Increased opportunities for professional meeting/ conference attendance				
Increased participation in projects or collaborations				
Greater “visibility” to the team or management				
More autonomy/freedom within the work environment				
Increased opportunities/scopes for professional development training, seeking diplomas/expertise in certain field				
Increased pay				
Other:				
Other:				
Other:				

7. Looking at the achievements listed in Question 2 of the Morale and Job Satisfaction section, do you feel you were appropriately recognized for your achievement(s)? If not, what kind of recognition would you have wanted?

8. Other notes:

## APPENDIX: PROFESSIONAL DEVELOPMENT TRACKER

Use this table to keep track of your professional development. Types of professional development might include: certifications earned, committees, conferences, goals, overcome problems/challenges, projects, publications, skills, trainings, troubleshooting or additional professional development opportunities.

Type of Development	Description	Outcomes / Skills Learned	Timeline
			Start Date:  End Date:
			Start Date:  End Date:
			Start Date:  End Date:
			Start Date:  End Date:
			Start Date:  End Date:
			Start Date:  End Date:
			Start Date:  End Date:
			Start Date:  End Date:
			Start Date:  End Date: