

Performance Management Development System (PMDS)

Helping to chart your development in UCD

UCD PMDS Guidelines



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1. Performance Management Development System in UCD

1.1 Introduction

The mission of UCD is to advance knowledge, pursue truth and foster learning, in an atmosphere of discovery, creativity, innovation and excellence, drawing out the best in each individual and contributing to the social, cultural and economic life of Ireland in the wider world.

One of UCD's key strategic goals is to become a leading research-intensive university where bold and imaginative teaching programmes and excellence in teaching and learning go hand in glove with a commitment to research, scholarship, innovation and creativity.

UCD recognises that the key to successfully achieving its mission lies in developing and harnessing the talents and energies of its staff. UCD recognises the unique contribution of individual staff members. The university is committed to providing the necessary supports to enable staff to contribute effectively to the strategic development of the university whilst fulfilling their personal career aspirations and goals. UCD Performance Management Development System (UCD PMDS) is designed to ensure that individual effort and career development are nurtured in a supportive way consistent with university goals.

1.2 Background

UCD PMDS provides a framework or set of guidelines to support the ongoing development of staff in a structured and informed way. It fosters clear, open and two way communication regarding ways of sustaining and improving individual development and identifying and addressing individual needs. UCD PMDS is not intended to interfere with or compromise the principles of academic freedom which are enshrined in the Universities Act, 1997 and to which the university is committed as an essential requirement to the achievement of its mission and the maintenance and development of a true academic ethos. The underlying principles of UCD PMDS have been agreed between unions and management. The system is underpinned by a formal agreement which is contained in section 9 of this document.

In accordance with the provision of the social partnership agreement, *Towards 2016 (T2016)* and previous agreements, *Sustaining Progress* and the *Programme for Prosperity and Fairness*, the university is required to implement a *Performance Management Development System*. This requirement was also established as part of the Public Service Benchmarking exercise.

1.3 Who is applicable?

PMDS will continue to apply to all staff on a minimum of a one year contract with the University. Please note post doctoral researchers will have a Career & Skills Development Framework, developed through the Research Careers Implementation Project, which will incorporate all the requirements of PMDS.

1.4 Key Principles underpinning UCD PMDS

The key principles underpinning PMDS at UCD are:

- Self-Reflection.
- Link to strategic plan.
- Promote a culture of continuous learning and development.
- Structured mechanism for feedback between Heads of Schools/Units (HOS/U), Line Managers/Supervisors and Staff Members.

Each of these principles is described in detail below.

1.4.1 Self-Reflection

The review is a planned formal process of self-reflection, self-evaluation and structured discussion aimed at professional and individual career development. It is not meant to be a judgemental process but a *developmental* process. This two-way conversation allows for open and regular discussions between staff providing assistance in developing staff potential. In order for the review process to work effectively, staff need to take ownership of the process and self-reflection will be pivotal to achieving value from the process.

1.4.2 Link to Strategic Plan

By being part of the process, staff take responsibility for their own development and learning actions. Within such a system not all individual actions may be met, given the limited resources available. Priority will be given to the development, skills training and actions, related to the strategic goals of the university. UCD PMDS recognises that there must be a link between the activities of staff with the university's strategic plan. This is accomplished by assessing each staff member's achievements and goals at four levels. The process allows integrated development at these levels: university; college/management units; school/unit and individual levels.

1.4.3 Promote a Culture of Continuous Learning and Development

By providing a structured opportunity for discussing development, skills training and support actions, staff can ensure they are focusing on learning and development that is relevant to their work objectives and career goals.

1.4.4 Structured Mechanism for Feedback between HOS/U, Line Managers/Supervisors and staff members.

Communication is an essential element of UCD PMDS. PMDS opens up the opportunity to develop clear, structured channels of communications across the university and promotes on-going two-way feedback between the 'reviewer' and 'reviewee'.

1.5 Benefits of UCD PMDS

UCD PMDS has many benefits for staff members, the college/school/unit and the university. These are outlined below;

1.5.1 Benefits to Staff

- Improves communication between staff at all levels.
- Enables better communication of the university's goals and values.
- Cultivates a culture of continuous improvement.
- Provides staff with support in identifying their personal learning and development actions and the best ways of meeting these actions.
- Provides staff with a clear understanding of how their role operates within their college/school/unit.
- Enables staff to prioritise the key aspects of their role.
- Improves overall performance.

1.5.2 Benefits to the University

- Improves communication between staff at all levels.
- Highlights the university's support and commitment to continuous learning and development.
- Widens participation in learning and development opportunities.
- Formalises the process of identifying personal development needs.
- Cultivates a culture of continuous improvement and overall increased performance.
- Demonstrates how individuals contribute to both local and university-wide activities.
- Improves planning at individual, school/unit and college level.
- Contributes to social partnership agreements by implementing a Performance Management Development System as agreed.

2. Terminology

2.1 PMDS

PMDS is an acronym for Performance Management Development System. The emphasis in UCD is on the 'D' for development

2.2 Reviewee

A reviewee is defined as a current permanent/temporary staff member (on a minimum of a one-year contract) within the university. Depending on circumstances, a staff member may be both a reviewee and a reviewer at different stages of the PMDS process.

2.3 Reviewer

A reviewer is a trained individual within a school/unit who is designated by the HOS/U to support an individual during their review. All reviewers will also be reviewees.

2.4 Review

A review meeting is a confidential conversation on an individual's career development. It provides the opportunity to sustain and improve individual performance and development actions. Reviews should be conducted formally once every two years or more often if requested by the reviewee. It is recommended that formal reviews should not take place more frequently than once a year. Informal feedback should be provided on an ongoing basis.

3. UCD PMDS Process

3.1 Introduction

UCD PMDS is structured around regular review meetings between individual staff members (reviewees) and designated reviewers, (a hierarchical relationship is not implied in these two roles). In advance of the review meeting, both the reviewee and reviewer will have the opportunity to prepare and consider the reviewee's contribution to the school/unit and the university. The review meeting itself is a structured face to face, two-way discussion which will enable the reviewer and reviewee to agree the individual's work objectives. This discussion provides an opportunity to recognise individual achievements, unique contributions, provide feedback and to focus on work priorities and development opportunities for the coming PMDS period. It is also a vehicle for identifying any development, skills training and support needs of individual staff members, if necessary.

It is designed to provide a structured opportunity for building on performance and achievements, through self-reflection, facilitated review and focusing on performance and energies towards key personal, professional and university goals.

For those who are considering participating in any of the university's promotion processes or competing for more senior posts, PMDS can assist in:

- enhancing awareness of strengths and areas of development and achievements to date;
- fostering two-way communication;
- focusing efforts towards gaining appropriate experiences and achievements;
- assisting in seeking the necessary supports to achieve goals in relation to career progression.

The President will act as the primary reviewer for the senior management team, including Vice-Presidents, College Principals and other direct reports. In turn, each College Principal and Vice-President will act as the primary reviewer for their Heads of Schools and Heads of Support Units respectively. Each HOS/U will be responsible for ensuring that an appropriate reviewer is selected for each reviewee.

College Principals/Vice-Presidents and HOS/U will be required to report on the implementation of PMDS in the college/school/unit as part of the strategic planning processes. They will also be required to ensure that as a process, UCD PMDS contributes to both the achievement of agreed school/college and university goals, as well as creating a positive learning and development ethos for staff.

Training, coaching and briefing sessions on PMDS will be provided to all staff on a minimum of a one year contract and staff returning from leave (sabbatical/maternity leave etc).

3.2 What PMDS is not?

- A disciplinary medium (formal or informal)
- Used to air grievances
- Linked to incremental pay or promotion
- Intended to interfere with or compromise academic freedom
- A one size fits all approach.

4. Documentation

The PMDS process consists of three main stages, each of which is documented; these include:

1. Advance preparation (self-reflection)
2. Review meeting and action plan
3. Development action plan

The documentation provided is a template to form the basis for structured reflection, facilitated review and an agreed action plan. It is recognised, however, that a “one size fits all” approach may not be appropriate for UCD given the diversity of the staff complement.

4.1 Form 1 - PMDS Self-Reflection, Meeting and Action Plan

The reviewee receives Form 1 from their reviewer two weeks before review date. During this period, they will reflect on their role and career development needs before forwarding the draft document to their reviewer. During the review meeting, the reviewer and reviewee will discuss and agree on the reviewee’s achievements and progress to date, objectives for the coming review period, identify any learning and development actions completed and how they were implemented in their role (since their last review, if applicable), career development goals and any learning and development actions required to achieve these objectives. The form will be updated/completed at the meeting.

4.2 Form 2 – Completion of Reviews & Learning & Development Actions

This form is completed by the reviewer and records all the reviews they have completed and any learning and development actions requested by the reviewees. Once completed this form is sent to the HOS/U for approval. Before sending the form to the HOS/U, the reviewer must sign and date it indicating they have amalgamated the learning and development actions for their reviewees. Having approved the learning and development requests, the HOS/U will sign and date the form and return the authorised form to the reviewer who will then notify reviewees of authorised actions.

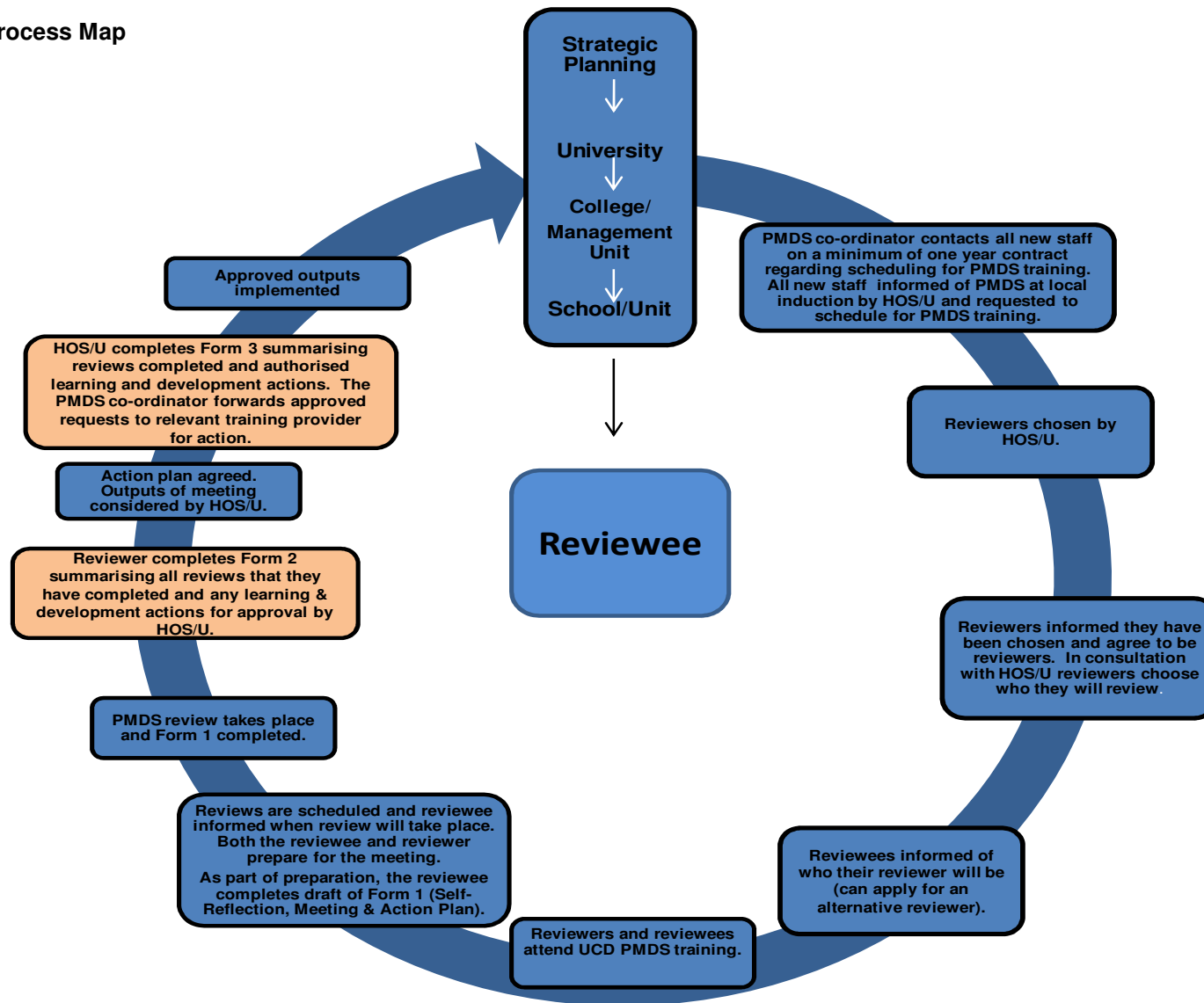
After completing the review, the reviewer should ensure that all learning and development requests are forwarded to the HOS/U for approval on a regular basis (every 6 - 8 weeks).

4.3 Form 3 – Summary of Reviews Completed and Authorised Learning & Development Actions for School/Unit

This form is completed by the HOS/U indicating reviews completed in their area and authorised learning and development actions requested by the reviewees. The completed form should be forwarded by the HOS/U to the PMDS co-ordinator at pmds@ucd.ie for action, every two months. This is to ensure that requests are acted on, in a timely manner. The scheduling of reviews will be very important in each school/unit. A copy of this form will also be sent by the HOS/U to the appropriate College Principal/Vice-President & HR Partner (where applicable) for information purposes. It is the responsibility of the HOS/U to keep updated records on reviews completed in their school/unit and to keep soft copies of any PMDS information in a confidential and secure location.

5. Stages of the Process

5.1 UCD PMDS Process Map



5.2 Steps in the process

- The HOS/U assigns reviewers within their school/unit. This may be done through consultation with the School Executive and colleagues if the HOS/U deems necessary.
- The HOS/U hosts briefing sessions with reviewers prior to them carrying out reviews to assign reviewees to suitable reviewers and to ensure staff expectations are managed throughout the PMDS process. This session should include information on what resources and support are available within the school to support staff requests through PMDS, as well as highlighting the existing support available in the university.
- The reviewer makes contact with the reviewee to agree a time for the review meeting to take place.
- The reviewer asks the reviewee to read Form 1 and refer to the Learning and Development Directory before completing in draft form.
- The review meeting takes place and Form 1 is completed and action plan agreed by reviewer and reviewee.
- The reviewer completes Form 2 summarising all reviews that they have completed and any learning and development actions for approval by the HOS/U.
- The HOS/U considers actions requested on Form 2.
- The reviewer informs their reviewees of approved actions.
- The HOS/U completes Form 3 summarising reviews completed and authorised learning and development actions and forwards to pmds@ucd.ie.
- The PMDS co-ordinator forwards approved requests to the relevant training provider for action.
- The internal training and development providers confirm receipt of requests directly with reviewees.
- The staff member completes development/training requested.

5.3 Before the Review Meeting

5.3.1 The Reviewer

After the HOS/U has designated staff in their area to the role of reviewer, each reviewer must complete a one day reviewer training programme before conducting reviews. Having completed the reviewer training, the reviewer can now schedule reviews with their reviewees. The reviewers should make contact with their reviewee to arrange a suitable time and agree a venue for the review meeting. The reviewer should ensure that the reviewee has completed PMDS training before agreeing to conduct the review. When choosing a suitable venue, the reviewer should ensure that privacy is upheld at all times as the principle of confidentiality is integral to the entire process. Conducting the review meeting at the reviewer's desk is not recommended, firstly because it is over-formal, but more importantly it does not allow for confidentiality. The best setting is one which is comfortable and which implies a constructive discussion. Notice should be given at least two weeks in advance to allow sufficient time for both parties to prepare. It is at this stage that the reviewer should ask the reviewee to download Form 1 from the PMDS website at www.ucd.ie/pmds. If the reviewee does not have access to a PC they should ask their reviewer to send a copy by post. Alternatively, contact the PMDS co-ordinator on 01 7164913 or email pmds@ucd.ie who can arrange for copies to be sent out.

During this period it is recommended that the reviewee spend time reflecting on their role and career development needs before completing Form 1. The reviewee should forward, ideally by email, when possible, the completed form to their reviewer one week in advance of the review meeting to allow their reviewer prepare for the meeting. Both the reviewer and reviewee should refer to the Learning and Development Directory which is available at www.ucd.ie/pmds/ebook to see what training programmes are available to UCD staff. If neither party has access to a PC, they should contact the PMDS co-ordinator on 01 7164913 or email pmds@ucd.ie who can arrange for copies to be sent out.

When new staff are assigned to the reviewer, the reviewer should contact them straight away to ensure they have attended PMDS training and are familiar with the process. They should also schedule a date for the first PMDS review.

5.3.2 The Reviewee

Having agreed a suitable time and venue for the review meeting with their reviewer (at least two weeks before review date), the reviewee should download Form 1 from the PMDS website at www.ucd.ie/pmds. If the reviewee does not have access to a PC they should ask their reviewer to send a copy by post. Alternatively, contact the PMDS co-ordinator on 01 7164913 or email pmds@ucd.ie. During this period the reviewee should spend some time reflecting on their role and career and development needs before completing the form and sending to their reviewer at least one week in advance of the review meeting to allow the reviewer some time to prepare. A reviewee may decide not to complete Form 1 in advance of the

review meeting, however, it is recommended that they do so, to allow them get the most out of their review.

The reviewee should refer to the Learning and Development Directory which is available at www.ucd.ie/pmds/ebook to see what training programmes are available to UCD staff. If a reviewee has been informed by the HOS/U who their assigned reviewer is and has not been contacted by them regarding their review, they should contact their reviewer directly and agree a suitable time and date for the review meeting.

5.4 The Review Meeting

5.4.1 Completing Form 1 (See Appendix 2)

Form 1 is a discussion document and can be completed in draft form by the reviewee before the meeting when reflecting on their objectives and learning & development requirements or during the PMDS review by the reviewer when actions have been agreed. During this confidential meeting, the reviewer and reviewee will discuss and agree on the reviewee's achievements, helps and hindrances and progress to date, career development, objectives for the coming period (linked to school/unit strategy) and any learning and development actions required to achieve these objectives.

Personal Information & Review Details (Section 1)

At the start of the review meeting, the reviewer or reviewee will complete the personal information and review details section. The period covered by this document is considered to be the time from their current review to the next review (over a two year period). For example, if a staff member had their review in June 2008 the date for their next review will be before June 2010. It is important at this stage that both parties are clear on the period covered by this document and any agreed objectives are achievable within this timeframe.

Objectives Achieved (Section 2)

When completing this section, consideration must be given to the reviewee's main achievements against the agreed objectives since the last review (recorded on Form 2 from their last review). For example, a staff member scheduling their review in June 2010 would refer to the two year period since their last review in June 2008. If a previous Form 1 does not exist (e.g. in the first year of PMDS or a new staff member), the reviewee should consider personal objectives agreed elsewhere. If these are not available, the reviewee should look at the objectives for the school/unit and consider how they contribute to these. Academic staff could look at these under the headings such as Teaching and Learning, Research, Innovation and Contribution.

Learning & Development Actions Completed & Implemented (Section 3)

This section requests the reviewee to identify any learning and development actions they have completed during the last cycle (in the last two years up to review date) and how these were implemented in their role. e.g. a reviewee may have requested to complete presentation skills training at their last review and have since given a number of presentations as part of their role. Another example of this may include a reviewee who requested training in marketing who has become more involved in marketing initiatives within their school/unit. In addition to training courses, a reviewee may have requested other learning and development supports, such as work shadowing. The reviewee should be able to identify how this support was implemented in their role and the impact it had on their development and in meeting their objectives.

Helps/Hindrances to Achieving Objectives (Section 4)

Consider the factors that may have affected the reviewee achieving the agreed objectives since the last review (if this is the reviewee's first review, reflect on the period since he/she started in the current role). E.g. *Helps*: good programme structure, support from team, larger budget available. *Hindrances*: tight deadline, lack of support, limited resources, incompatible systems and budget cuts.

Examples of measures to overcome hindrances include renegotiating costs, a project sponsor who can offer more support etc.

School/Unit Objectives (Section 5)

When completing this section please refer to the school/unit strategy for this period and extract the objectives that are relevant to the reviewee. The objectives for each school/unit are cascaded down from the university's strategy which is available at www.ucd.ie/president. The reviewee should ask their reviewer or HOS/U for a copy of the strategy for that school/unit if they do not have access to it. In areas where no strategy exists, staff should think about what the future success of their school/unit is. For example, a research unit's vision may be achieving cutting edge research and hence teaching for particular practice. At an individual level, reviewees should think about what they see as the vision and set goals to contribute towards achieving this vision.

Career Development Goals (Section 6)

In this section please list the reviewee's short-term (up to 2 years) and long-term (2-5 years) goals. It is important that the reviewee be specific in setting their goals and aims for themselves relating to where they would like to see their career moving in the short and long term e.g. promotion to senior lecturer, supervisor, technical officer, administrative officer or publishing a paper. It may also include moving to a different discipline, unit or function.

Key Objectives for the Coming Period (Section 7)

This refers to the reviewee's work aims or goals. These are the high-level tasks involved in the reviewee's job e.g. publishing articles, completing a project etc. The reviewer must consider these from two viewpoints: firstly, what the reviewer and reviewee feel the reviewee needs to achieve as a contribution to the college/unit objectives and, secondly, what the reviewee is capable of achieving with the appropriate support and development. The reviewee needs to consider what he or she could achieve if the *internal* factors were optimised (possibly through coaching or mentoring) to improve skills, and if the *external* blocks to performance could either be removed or minimised.

E.g. *Objectives*: to gain more management experience, publish an article, maintain standards, gain experience in other areas within the current unit. *Actions required*: attend a management skills training programme, seek academic support on publishing and developing international links, transfer of knowledge among colleagues on processes/operation of equipment, work shadow opportunities.

Learning and Development Actions (Section 8)

This section is broken into three areas to cater for the different learning and development options available – *Learning and Development Programmes, Job Specific Training and Development/Support/Resources/Information*.

- *Learning & Development Programmes (Section 8.1)*
There are a significant number of learning and development resources and opportunities available within UCD. These include HR Training & Development, UCD Teaching and Learning, IT Services, Safety Office, Registry, Procurement and Contracts Office, Quality Office, NOVA UCD and Library Services. Programmes offered by these providers are listed in the Learning & Development Directory which is available online at www.ucd.ie/pmds/ebook.

All programmes listed in this directory have a code which must be used when completing this section.

It is important that both the reviewer and reviewee refer to this directory when completing this form and enter the relevant codes as per the Learning & Development Directory. The reviewer should guide the reviewee in relation to relevant programmes that are specific to the reviewee in meeting their objectives and achievable within the period of the PMDS cycle (two years).

If there is a similar type of training programme that the reviewee requires that is not listed in the Learning & Development Directory the reviewee should discuss with the reviewer what the benefits of this programme will be in meeting their objectives e.g. Public Relations course, motivational skills training or creative problem solving. Please be as specific as possible when entering the programme details. This information should be entered in Section 8.1 on Form 1. (Note to reviewer, please enter course title in place of programme code on Form 2.)

- *Job Specific Training (Section 8.2)*
This is any training that is specific to the reviewee's role/school/unit and is not available in the Learning & Development Directory. This training should be organised at HOS/U level depending on resources e.g. advanced welding, book cataloguing.
If a HOS/U requires assistance in relation to this training, they should contact Training & Development at staffdevelopment@ucd.ie to discuss.

- *Development/Support/Resources/Information (Section 8.3)*
Quite often a training programme may not be the most effective means of development or support available to staff in meeting their objectives. It is important to consider other options e.g. work shadowing, head up a project team, seek support from senior academics on publishing and development of international links or access to new equipment.

Additional Comments (Section 9)

Before the review meeting ends, the reviewer must ensure that the reviewee is aware that any learning and development requests (in Section 8) will be forwarded to a third party for action (HOS/U, PMDS co-ordinator, internal training providers) and consent from the reviewee is required. Where a reviewee does not wish for their name to be included on learning and development requests, the reviewer may submit this information recording the learning and development action only, omitting the name of the person who requested it, simply noting the school/unit to which they belong. Any communication from the PMDS co-ordinator and training providers in relation to this learning and development request will be made directly through the reviewer. It is the responsibility of the reviewer to notify the reviewee of any developments in relation to their request.

Acknowledgement of PMDS Action Plan (Section 10)

At the end of the review meeting the reviewer and reviewee sign Section 10. This signature acknowledges that they have discussed and agreed the reviewee's work objectives, achievements and any learning and development actions for the next PMDS cycle (over a two year period). With the reviewee's consent, the reviewer will bring any learning and development requests to the attention of the HOS/U for consideration and will relay any decisions to the reviewee.

Both the reviewee and reviewer agree a date for the next review meeting. This should be within the two year PMDS cycle, however, it is encouraged that the reviewer and reviewee meet on an informal basis over the two year period.

It is the responsibility of the reviewer to provide a copy of the completed Form 1 to the reviewee. The original will be retained by the reviewer in a secure location until the next PMDS review. All copies of this form are to be returned to the reviewee when the cycle is complete.

It is recommended that after forms are signed they should be scanned and held securely on the reviewer's system which can then be emailed to the reviewee. The scanned version is then considered the original. Password protection can be used as means of ensuring confidentiality.

5.5 After the Review Meeting

5.5.1 Completing Form 2 - The Reviewer and Head of School/Unit (See Appendix 3)

This form should be completed by the reviewer indicating the reviews which they have completed and any learning and development actions requested by the reviewees.

The reviewer should ensure that all learning and development requests recorded on Form 2 are forwarded to the HOS/U for approval on a regular basis (every 6-8 weeks). If/when actions have been authorised, a signed copy of Form 2 will be returned from the HOS/U to the reviewer for discussion with their reviewees. The reviewer should keep a soft copy of the authorised form in a secure location.

Summary of Reviews Completed and Learning & Development Actions (Section 1)

When completing this section, the reviewer will go through all of the completed Form 1s for their reviewees and extract the relevant information e.g. Reviewee name, Personnel Number (this can be found on the reviewee's payslip or staff card and should be provided by the reviewee) UCD email (if known), UCD extension number or work contact number, Date of Review Meeting, Learning & Development Programmes (as per the Learning and Development Directory. If there is a *similar* type of training programme which the reviewee requires that is not listed in the Learning & Development Directory, the reviewer should enter the course title in place of programme code), Job Specific training (training specific to reviewee's role/school/unit) and Development/Support/Resources/Information (e.g. work shadow, new equipment, support from colleagues).

All staff who have completed their reviews should be recorded in this section even in cases where no learning and development actions have been requested.

After the form has been completed and signed by the reviewer, the form is forwarded to the HOS/U for consideration.

After the review takes place it is recommended that the reviewer complete and forward this form to their HOS/U for approval on a regular basis (every 6-8 weeks).

After receiving Form 2 from the reviewer, the HOS/U will complete the 'Approved by' column in Section 1 by marking Y for yes the request has been approved or N for no, the request has not been approved. When completing this form, the HOS/U must also enter their cost centre code in the 'Cost Centre' column for any approved learning and development actions. The HOS/U should be aware that by providing their cost centre details that they are aware of the cancellation fees for staff who cancel their places on any training programmes provided by learning and development units in UCD. After completing these sections, the HOS/U will return the signed form to the reviewer.

It is the responsibility of the reviewer to notify the reviewee of the decision made in relation to their learning and development requests. This can be done through a meeting, sending an email or making a call to the reviewee informing them on any decisions made in relation to their requests. This feedback is important to complete the PMDS review so staff then take responsibility to attend the training or complete the development path they have requested and that was authorised. All staff members must discuss dates of training with their Manager/HOS/U before confirming attendance. The reviewee will be contacted directly by the internal training providers in UCD with details of training programmes, when the authorised requests are received via the HOS/U.

Signatures Confirming Information Collated (Section 2)

Before sending Form 2 to the HOS/U the reviewer must sign and date this section indicating that they have amalgamated the learning and development actions for their reviewees.

Having completed the relevant areas in Section 1, the HOS/U must sign and date this form indicating that they have considered the learning and development actions for the reviewees and notified the reviewer of the decision made. It also implies that the HOS/U is aware of the cancellation fees for staff who cancel their places on training programmes provided by internal training providers.

Signature Confirming Feedback to Reviewees (Section 3)

Having received the authorised version of this form from the HOS/U the reviewer must sign and date this section and let the reviewees know what has/has not been authorised.

5.5.2 Completing Form 3 – Head of School/Unit (See Appendix 4)

This form should be completed by the HOS/U indicating reviews completed in their school/unit and to amalgamate the learning and development requests authorised by the HOS/U. Reasons why learning and development requests may not receive approval may include: budget cuts, time constraints, not specific to role/meeting objectives. At this stage, all learning and development actions have been authorised by the HOS/U and the reviewers and reviewees informed on what will be provided.

Signed copies of this form will be sent by the HOS/U to the College Principal/ Vice-President and HR Partner (where applicable) for information purposes. The HOS/U will also send the signed form to the PMDS co-ordinator who processes this information, liaises with the internal training providers and acts as a point of contact and support in relation to UCD PMDS. It is recommended that the HOS/U complete and forward this form to the PMDS co-ordinator as soon as possible after approving any learning and development actions to minimise delay in the provision of these requests.

It is also the responsibility of the HOS/U to keep updated records on reviews completed in their school/unit as this information will be requested at the end of each PMDS cycle (once every two years). The HOS/U should keep copies of PMDS forms in a confidential and secure location.

Signatures (Section 1)

The HOS/U will sign this section agreeing that all the information provided in Section 2 is accurate and has been authorised for action.

Summary of Reviews Completed and Authorised Actions (Section 2)

When completing this section, the HOS/U will transfer all the relevant information from the Form 2s they received from their designated reviewer/s e.g. Reviewee name, Personnel Number, Contact details, Date of Review, Learning & Development Programme.

All staff who have completed their reviews should be recorded even in cases where no learning and development actions have been requested. This data will provide the HOS/U with a summary of staff in their school/unit who have completed their reviews and any authorised learning and development actions. It will act as a training needs analysis for the school.

All authorised learning & development requests should be recorded and sent to the PMDS co-ordinator for information and in some cases action. The PMDS co-ordinator will then pass on the learning & development requests to the relevant learning & development providers in UCD (IT Services, HR Training & Development, UCD Teaching and Learning etc). It is important that requests received under 'job specific training' or 'developmental/support/resources/information' are dealt with at school/unit level (section 8.2 and 8.3 on Form 1). The PMDS co-ordinator needs to be aware of these requests to monitor trends, for example, if a programme is being requested in a number of areas but is not currently run it may be that it should be run by one of the internal providers. Last year this was the case in relation to Statistics, which wasn't offered previously but trends from PMDS requests showed that it was in demand to meet learning & development needs of a number of staff across the university, therefore it was discussed, designed and rolled out to staff. In other cases some job specific training was required on GIS and two schools with the same needs were put in touch with each other so they could organise the training and achieve value for money by sharing the costs involved. In many cases the training or development need under these categories will have to be prioritised at school/unit level such as welding or work shadowing, however, the co-ordinator can provide guidance/information on this to the HOS/U.

The amalgamated authorised learning and development actions (recorded on Form 3) should be forwarded by the HOS/U to the PMDS co-ordinator (pmds@ucd.ie) for action every two months. Reviewers and Heads of School/Unit should note that retention of PMDS Forms 2 & 3 and failure to submit learning and development requests for action, in a timely manner, can have a significant impact on a staff member's access to learning and development opportunities provided by the university.

5.6 Follow-Up

After the PMDS co-ordinator receives Form 3 from the HOS/U, an email will be sent to the reviewee by the training provider who requested the learning and development action (where no contact details are provided, contact will be made with the reviewer) acknowledging that their request has been received and every effort will be made to fulfil this request within the next six months, depending on demand.

For job specific training requests, the HOS/U must organise at local level, however if assistance is required in sourcing providers, they should contact Training & Development at staffdevelopment@ucd.ie or pmds@ucd.ie

The PMDS cycle begins again.

The PMDS Suggested Timeline

Start	→	→	→	→	→	→	Finish
		Week 1	Week 2	Week 4	Week 5	Week 8	
Reviewer and Reviewee arrange review date (2 weeks notice)	Reviewee downloads and completes Form 1	Form 1 is sent to reviewer	Review meeting takes place	Reviewer completes Form 2	HOS/U receives Form 2s from reviewer for approval	HOS/U completes Form 3 and forwards to PMDS co-ordinator	Form 3s received by PMDS co-ordinator

6. Confidentiality

The UCD PMDS process is run in full compliance with the University's data protection policy and procedures, available at www.ucd.ie/dataprotection. Throughout the PMDS process privacy is assured at all times.

- **6.1 Form 1 - Self-Reflection, Meeting & Action Plan**

The work plan developed at the review meeting is strictly confidential. Form 1 is confidential between the reviewer and the reviewee and copies of this form are only held by the two parties.

In order to address the learning and development actions identified and to provide the associated skills training and support, the reviewer will extract this information from Form 1.

- **6.2 Form 2 - Completion of Reviews and Learning & Development Actions**

With the explicit consent of the reviewee, individualised information will be brought to the attention of the HOS/U on Form 2 by the reviewer. This will allow a comprehensive assessment of the development actions and the best means of addressing these at school/unit level.

- **6.3 Form 3 - Summary of Reviews Completed & Authorised Learning & Development Actions for School/Unit**

Consequent training actions will be authorised by the HOS/U and will be based on objective, transparent and justifiable grounds (on Form 3).

The authorised learning and development requests for each school/unit will be passed to the College Principal/Vice-President for information by each HOS/U.

- **6.4 Follow-Up**

The data on Form 3 will be sent by the HOS/U to the PMDS co-ordinator for information and action. Learning and development actions will be forwarded to the appropriate internal training and development providers (e.g. HR Training & Development, UCD Teaching & Learning and the Safety Office) by the PMDS co-ordinator.

The reviewer is responsible for filing a copy of the agreed review form within their confidential filing system. This copy is returned to the reviewee at the end of the two year cycle and the new agreed review form will replace it. The reviewee will also retain a copy of the agreed form.

A copy of the agreed UCD PMDS document is not held on the personnel file of the reviewee.

7. Who is involved in UCD PMDS and what is their role?

7.1 College Principal/Vice - President

- Supporting the HOS/U with PMDS issues.
- Designating an alternative reviewer for staff when requested, together with the HR Partner/Training & Development.
- Receiving Form 3, learning and development requests (learning and development programmes, specialised training and development/support) for each school within the college, for information purposes. (College Principal)
- Receiving information on learning and development requests from each Unit (Vice-President)
- Ensuring consistency across the College/management unit.

7.2 Head of School/Unit/Institute

Ownership of PMDS lies within the Schools/Units. The role of the HOS/U is to ensure the effective implementation of PMDS within their area.

New Staff/ Staff returning from Leave

- New staff, on a minimum of a one year contract, or staff returning from leave should be directed by their HOS/U to contact pmds@ucd.ie when they commence employment as part of their local induction, to book a place on PMDS training.
- Appointing new reviewers when required within their School/Unit. This may be done through consultation with the School Executive and colleagues if the HOS/U deems necessary. In an Academic context, the reviewer does not have to be an expert in the reviewee's field of expertise. Academic staff are not reviewed on their academic discipline. If an appropriate Technical Management or Administrative structure is in place in a school/unit, the appropriate Chief Technical Officer/Administrator in that school/unit may conduct the reviews.

Existing staff

- Ongoing management of PMDS. The HOS/U should inform UCD HR (Training & Development) if a staff member is being designated as a reviewer. If this person is already a member of staff, they will have to complete the reviewer training. If they are a new member of staff in the University, they will have to complete the mandatory training for reviewers.
- Hosting briefing sessions with reviewers to ensure they know their role and responsibilities and they are capable of managing the expectations of the reviewee. This should be done on an annual basis as reviews are being completed within the School/Unit.
- Managing staffs expectations in relation to what PMDS can/cannot offer them.
- Communicating PMDS as an opportunity for continuous learning & development.

Sponsoring

- Sponsoring PMDS within their school/unit.
- Discussing PMDS with College Principal/Vice-President to ensure consistency across the college/management unit.
- Using PMDS to assist in the delivery of the School's/Unit's strategic goals.

Ownership

- Acting as a reviewer in the PMDS process. All Heads of School/Unit/Institute must undergo reviewer training. New Heads of School/Unit will be contacted by UCD HR (Training & Development) to meet to discuss the PMDS process and their role as HOS/U and reviewer.
- Ensuring the School/Unit strategy is communicated to all staff, to enable staff to reflect on their contribution to this strategy.
- Ensuring that PMDS is conducted in accordance with and informed by the training provided by the university.
- Ensuring reviews take place within their School/Unit within the agreed timeframe.
- Maintaining a record of reviews completed in each cycle and providing this information to the PMDS co-ordinator at the end of each cycle.
- Working with reviewers and learning and development units to ensure learning and development requests are delivered on.
- Evaluating the effectiveness of the scheme in their area and making improvements where appropriate.

7.3 PMDS Steering Group

The primary function of the Steering Group is to ensure that PMDS becomes embedded in UCD. Specifically, the Group is responsible for the following:

1. To oversee the continued implementation of PMDS by:
 - a. Examining emerging statistics and trends and taking appropriate action as required;
 - b. Sponsoring methods that will help measure the quality and success of PMDS;
 - c. Exploring methods of process improvement including the appropriate use of technology ;
 - d. Planning the next phase of PMDS;
 - e. Promoting PMDS and it's objectives to all staff.
2. To approve formally requests for PMDS review extensions at a college level.
3. To ensure that the terms of the PMDS agreement are being observed.
4. To have the Chair/their nominee act as Senior Management Team liaison.

7.4 UCD HR

7.4.1 HR Training & Development

Training

- Providing training for staff on UCD PMDS.
- Training new Heads of School/Unit on the PMDS process and their role as HOS/U and reviewer.
- Organising leadership, management and interpersonal skills training authorised by the HOS/U for staff in a timely manner. In addition, the unit is responsible for ensuring that this training meets the needs of staff.
- Communicating with staff in relation to the above requests.

Administration & Support

- Ensuring that UCD PMDS is conducted in accordance with and informed by the training provided by the university.
- Maintaining the UCD PMDS website.
- Acting as PMDS 'support' for units in Central Administration, Research and Library.
- Evaluating the effectiveness of the system within UCD with the support of the Heads of School/Unit.

PMDS co-ordinator

- Responsible for communicating with new staff on UCD PMDS.
- Responsible for organising training on PMDS, including refresher training.
- Informs schools/units/HR Partners of key dates in the PMDS cycle.
- Receives completed Form 3 indicating authorised learning and development requests in each school/unit for that period (if any)
- Extract relevant information from Form 3 (provided by Heads of School/Unit) for each learning & development provider and share this information with them.
- Provide assistance to the HOS/U on any specialised training requests and sourcing new courses.
- Supports HR Partners with any PMDS queries.
- On an ongoing basis gather statistical information on training needs, reviews completed etc.
- On an annual basis request an update from each school/unit on reviews completed as a temperature check. At the end of the PMDS cycle a formal update on reviews completed will be requested.
- Examine trends on programmes requested which are not currently run in the University to see which area should be running them or if schools/units could achieve value for money by joining together to run the programme.
- Run monthly report on staff who have left UCD and remove these staff from PMDS lists.
- Maintenance of UCD PMDS website.
- Ongoing support and point of contact on UCD PMDS
- Co-ordinating statistics on reviews completed.
- Co-ordinating statistics on training requested through PMDS that is completed.
- Reporting to Steering Group on progress on PMDS reviews.
- Negotiating next phases of PMDS such as 360 degree feedback along with other stakeholders.

7.4.2 HR Partner

- Acting as PMDS 'support' in each college/school.
- Providing ongoing information on UCD PMDS to those in their college/unit.
- Acting as a conduit between a reviewee and College Principal/Vice-President if a reviewee applies for an alternative reviewer.
- Acting as a support mechanism for reviewees who have not completed their review within the PMDS review cycle.
- Supporting the HOS/U to ensure a record of reviews is kept in each PMDS review cycle.
- Supporting the HOS/U to ensure a record of authorised development, skills training and supports needs are maintained.

7.5 Learning & Development Providers in UCD

- Contacting individuals to confirm requests through PMDS were received and what next steps are.
- Organising relevant training and development initiatives, where possible.
- Ensuring HOS/U are aware of any costs that may be incurred by staff attending a training programme or any cancellation fees.
- When requested, providing information to HR Partners and HOS/U on staff in their school/units who have completed training.
- Maintaining statistics on training trends through PMDS.
- Each area accepts responsibility for following up on requests to their area.

7.6 PMDS Reviewer

- Completing the UCD reviewer training course prior to carrying out any reviews.
- Supporting the reviewee.
- Articulating clearly the school's/unit's strategic aims.
- Helping the reviewee formulate their own personal objectives linked to the schools/units strategic aims; and supporting the reviewee in identifying their development, skills training and support needs.
- Managing reviewee's expectations in relation to what PMDS can achieve.
- Committing to having regular and timely review meetings with the reviewee throughout the PMDS two-year cycle.
- Scheduling formal reviews at a minimum once every two years.
- Have responsibility with the reviewee for carrying out the formal PMDS aspects (completion and sign off of forms).

7.7 PMDS Reviewee

- Reviewees are obliged to participate in the process.
- Completing PMDS reviewee training prior to completion of their first review.
- Identifying and articulating day-to-day activities and outline work objectives.
- Ensuring their activities and objectives are prioritised appropriately and linked to the goals of the school/unit, through discussion with the reviewer.
- Agreeing a work plan with objectives, outline reasonable steps to achieve these objectives, and agreeing upon a timeframe for completion.
- Identifying and agreeing personal development needs in performing their role and meeting work objectives.
- Participating fully in the PMDS process on an ongoing basis by: discussing development with the reviewer on an ongoing formal and informal basis; documenting the outputs of the formal review conversation through the completion and signing off of the UCD PMDS forms.
- Carrying out all related PMDS training.
- At the review meeting, the reviewer and the reviewee will agree the individual work objectives of the reviewee and reasonable steps will be taken to achieve those objectives within an agreed time.

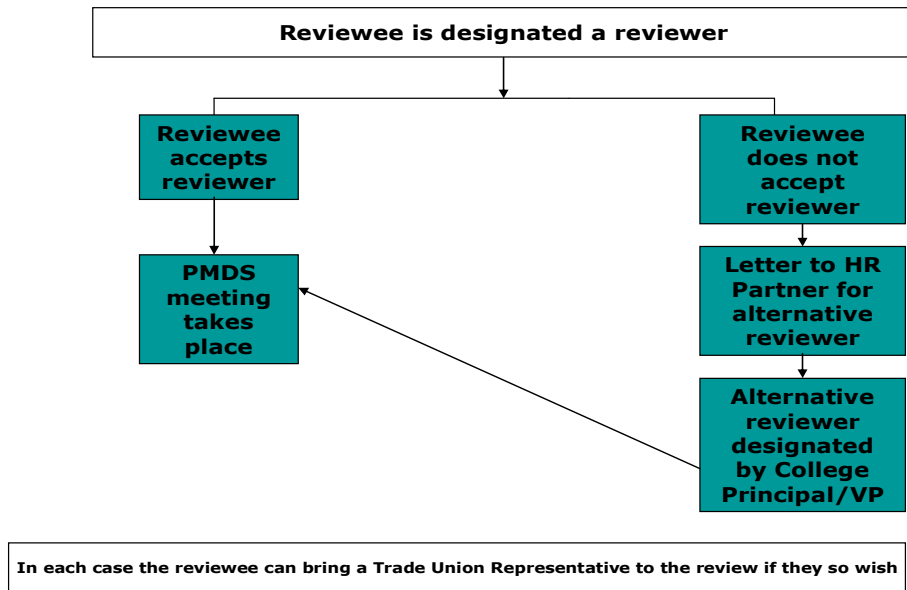
8. Appeals Mechanism

A reviewee should not sign off on Form 1 if they do not agree with objectives being set for the following review period.

If a reviewee does not wish to be reviewed by their designated reviewer they may choose to have a Trade Union Representative attend the review meeting(s) with them, or apply in writing to the HR Partner for an alternative reviewer, citing their reason(s) (optional), refer to **appendix 1**. The HR Partner will then consult with the College Principal/Vice-President. The College Principal/Vice-President will designate an alternative reviewer from the pool of reviewers within the school/unit. The HOS/U will be informed of the change of reviewer for information purposes.

This option will apply once in every review period (two year cycle).

PMDS appeals mechanism



9. Union Management Agreement on PMDS

The Performance Management Development System (PMDS) framework is agreed between unions and management. The following key principles are agreed between the university and the trade unions on the implementation of PMDS at UCD. The scheme may be reviewed from time to time jointly by unions and management.

- The PMDS at UCD is designed to ensure regular (every two years or more regularly at the request of the reviewee) structured, and meaningful dialogue between individual staff members and a designated PMDS reviewer, that allows a review of performance and development needs in line with key personal and organisational goals. If, for a valid reason, the reviewees do not wish to be reviewed by their assigned reviewer, they may discuss this with their HR Partner.
- PMDS is not linked with formal disciplinary or grievance procedures. PMDS is not an appropriate forum to address disciplinary matters, raise grievances or lodge complaints.
- PMDS is confidential to the parties directly involved, apart from agreed outputs/outcomes which would be shared in order to ensure that they are addressed. Documents shall be retained by the reviewer and the reviewee and be destroyed immediately after subsequent review takes place. Staff shall not be obliged to sign any form should they not wish.
- PMDS is not linked directly or indirectly with pay, incremental progression or promotion. If such links were ever to be introduced in the future then they would require separate negotiations and agreements with unions.
- Staff have the right to be accompanied by a recognised Trade Union Representative at their review meeting, if they wish, provided they inform the reviewer at least one week in advance of the agreed meeting.
- It is the responsibility of the reviewer to arrange the meeting and identify a venue. The meeting will be arranged by agreement with the reviewee with sufficient notice (at least two weeks). Arranged meetings can also be changed by mutual agreement and with sufficient notice. Review meetings will not normally last longer than 60 minutes and staff will only be required to fill in a form, not more than 3 pages, in advance.
- The parties agree to operate a fully resourced Performance Management Development System (PMDS). Where it is agreed that maintaining and/or improving performance may require access to development opportunities, these will be made available. Some schemes that encourage development (e.g. UCD Teaching and Learning) may already exist; however, new schemes may need to be created as information gathered from the operation of the PMDS is collated. Ideally, development schemes which will be available at a university level will be funded centrally and will be available to all appropriate staff. No staff member shall be disadvantaged in their access to these schemes.

Where an individual's agreed PMDS report identifies a performance issue that may be remedied by access to a developmental scheme, this should be stated in the report. If this is not, or cannot be, provided within the time frame of the reporting period, this should be stated in the subsequent report.

- Within one year of the PMDS cycle beginning, the parties to the agreement will meet to design and negotiate an upward feedback scheme to be put in place to complement the PMDS.
- Nothing in this agreement will be used to restrict academic freedom.
- The whole process of implementation of PMDS shall be overseen by a Joint Union-Management Committee.

(November 2006)

10. Further Information

If you require any further information on UCD PMDS please view the UCD PMDS website at www.ucd.ie/pmds , email pmds@ucd.ie or phone (01) 7164913.

The UCD PMDS website www.ucd.ie/pmds includes further information on UCD PMDS such as, frequently asked questions, tips for reviewers and reviewees, information on PMDS training and useful documents.

If you have any questions on PMDS not answered on the website, please email pmds@ucd.ie or phone (01)7164913.

If you have any questions or comments on the UCD PMDS Guidelines please email pmds@ucd.ie

APPENDIX 1

Date

Name of HR Partner
UCD Address

Re: PMDS review

Dear Name (HR Partner),

I am requesting that you (HR Partner) and the College Principal/Vice-President assign me an alternative reviewer.

Reason(s) (optional):

Yours sincerely,

Name
UCD Address
UCD Contact number

Cc If necessary

This letter will not be placed on any personnel file. It will be destroyed after an alternative reviewer has been agreed on.



UCD PMDS

Form 1: PMDS Self Reflection, Meeting and Action Plan (Reviewer & Reviewee)

(This is a discussion document. Before completing this form the reviewee should spend some time reflecting on his/her role, career and development needs. The reviewee should then complete a draft of the form and email it to the reviewer one week before the review meeting to allow time for preparation. The form is discussed, agreed and completed by both parties at the review meeting.)

Please refer to the PMDS website, PMDS Guidelines; School/Unit Strategy and the Learning and Development Directory before completing this form.

It is recommended that the reviewee spends time reflecting on their role, career and development needs prior to the review. During the review meeting the reviewer and reviewee will discuss and agree on the reviewee's achievements and progress to date, objectives for the coming period, helps and hindrances and any learning and development actions required to achieve these objectives.

Once this form has been completed and signed by both parties, it is the reviewer's responsibility to provide a copy to the reviewee. The original will be retained by the reviewer in a secure location until the next PMDS review. All copies of this form are to be returned to the reviewee when the cycle is complete.

Confidentiality

This form is confidential between the reviewer and reviewee and copies of this form are only held by the two parties. In order to address learning and development actions identified and to provide the associated skills training and support, the reviewer will extract this information from this form. With the explicit consent of the reviewee, this information will be brought to the attention of the HOS/U to allow a comprehensive assessment of the development actions and the best means of addressing these at school/unit level. (See Section 8).

In completing this form the reviewee and reviewer are asked to:

- Remember the quality of the conversation should take precedence
- Consider the reviewee's personal short and long term career development
- Review individual objectives by making reference to the strategic plans, job description for the post, relevant Quality Assurance reports and any other information relevant to the post
- Identify any learning and development actions completed during last cycle and how these were implemented as part of the reviewee's role
- Review existing UCD development opportunities including training programmes provided. These can be accessed on www.ucd.ie/pmds/ebook
- Examine learning and development actions that may be required. The reviewee should describe areas in which he/she would like to develop and ways in which this might be achieved.

Subject to joint agreement, objectives may need to be updated during the PMDS cycle should circumstances change. If something is not applicable please mark N/A.

Section 1: Personal Information & Review Details		
Name of reviewee:		
Job title:		
School/Unit:		
Personnel number:		
Reviewer Contact	Email:	Tel:
Period covered by this document:		
Date of last review (if applicable):		
Name of reviewer:		
Date of review meeting:		



SECTION 2: OBJECTIVES ACHIEVED

Please summarise the reviewee’s main achievements against the agreed objectives since the last review (if this is the reviewee’s first review, reflect on the period since he/she started in the current role).

SECTION 3: LEARNING & DEVELOPMENT ACTIONS COMPLETED & IMPLEMENTED

Please identify any learning and development actions completed since the last review and how these have been implemented as part of the reviewee’s role.

Learning & Development action completed during last cycle	How has this action been implemented as part of the reviewee’s role?

SECTION 4: HELPS AND/OR HINDRANCES TO ACHIEVING OBJECTIVES

Please identify what helped and/or hindered the reviewee in achieving these objectives and give consideration to any measures that might be taken to overcome hindrances.

Helped and/or hindered	Proposed measure(s) to overcome hindrances

SECTION 5: SCHOOL/UNIT OBJECTIVES

To complete this section the reviewee will need to read the school/unit strategy for this period and extract the objectives relevant to them. Seek help from the reviewer if necessary.

1.
2.
3.
4.
5.
6.



SECTION 6: CAREER DEVELOPMENT GOALS

What short-term goals (up to 2 years) and long-term goals (2-5 years) does the reviewee want to achieve?

Short-term	Long-term
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

SECTION 7: KEY OBJECTIVES FOR THE COMING PERIOD

In this section please consider the work objectives of the reviewee for the coming review period. These should be related to the school/unit objectives and if possible to career development goals. Please identify objectives and the actions required to achieve these objectives.

Objective	Key actions required to achieve this objective
1.	
2.	
3.	
4.	
5.	

SECTION 8: LEARNING & DEVELOPMENT ACTIONS

Please identify any learning and development actions required in meeting these objectives for the coming period. Please note that these requests should always be linked to the reviewees objectives for the current PMDS period.

8.1 Learning & Development Programmes (please refer to the Learning & Development Directory when completing this section – this is available at www.ucd.ie/pmdu/ebook)

Programme Code <i>(please enter programme code)</i>	Please state the reason for requesting this programme <i>(link to reviewee objectives)</i>

If there are similar programmes the reviewee requires that are not listed in the Learning & Development Directory, please discuss with the reviewer what the benefits of this programme will be in helping the reviewee meet the agreed objectives. Please be as specific as possible when entering the programme details below. E.g. Public Relations, Motivation skills.



(Note to reviewer, please enter course title in place of programme code on Form 2)

Name of Programme (be specific)	How will this help the reviewee in meeting their objectives above?

8.2 Job specific training (this is any training that is specific to the reviewee's role/school/unit and is not available in the Learning and Development Directory. This training should be organised at HOS/U level depending on resources. Eg. advanced welding, book cataloguing, GIS). If a HOS/U requires assistance in relation to this training, they should contact HR Training and Development.

Specialised training	How will this help the reviewee in meeting the agreed objectives above?

8.3 Development/Support/Resources/Information (a training programme may not always be the most effective means of development or support required in meeting objectives. Please consider other options – eg. Work shadowing, manage a project team, new equipment, improve personal teaching abilities etc.

Suggested action	How will this help the reviewee in meeting the agreed objectives above?

SECTION 9: ADDITIONAL COMMENTS

Reviewee comments	Reviewer comments
<p>I consent to my learning and development requests above (section 8) being forwarded to the relevant learning and development providers for action:</p> <p>Please circle: Yes / No</p> <p>Other reviewee comments:</p>	

SECTION 10: ACKNOWLEDGEMENT OF PMDS ACTION PLAN

The signatures below indicate that the reviewee and reviewer have discussed and agreed the reviewee's achievements, work objectives, career goals and development actions for the next PMDS cycle. With the reviewee's consent, the reviewer will bring any learning and development, skills training actions (recorded in Section 8) to the attention of the HOS/U for consideration and will subsequently relay any decisions to the reviewee. Both the reviewee and reviewer should agree a date for the next review meeting. This should be within the two year PMDS cycle.

Reviewee's signature: _____ Date: _____

Reviewer's signature: _____ Date: _____

Date of next review meeting: _____



UCD PMDS

Form 2: Completion of Reviews and Learning & Development Actions

(Reviewer → HOS/U → Reviewer)

(To be completed by the reviewer and forwarded to HOS/U for authorisation. After it has been authorised by the HOS/U, a copy is returned to the reviewer for information purposes.)

Please refer to the completed Form 1s, the PMDS website, PMDS Guidelines and the Learning and Development Directory before completing this form.

This form should be completed by the reviewer using the information gathered on Form 1, indicating the reviews which they have completed and any learning and development actions requested by the reviewees. The completed form is then sent to the HOS/U for authorisation. If/when the actions have been authorised, a signed copy will be returned from the HOS/U to the reviewer for discussion with their reviewees. Authorisation by the HOS/U must be based on objective, fully transparent and justifiable grounds.

Using this information the HOS/U completes Form 3 which summarises reviews completed and authorised learning and development actions for their school/unit. This will then be sent to the PMDS co-ordinator for action. Authorised requests will be forwarded by the HOS/U to the Vice President/College Principal and HR Partner (where applicable) for information purposes. Needs that cannot be met by the internal training providers are discussed at HOS/U level and appropriate action suggested to resolve.

Please complete this form in full. If something is not applicable please mark N/A

Name of reviewer:
Job title:
School/Unit:
<p>Period covered by this document:</p> <p>UCD PMDS reviews should be completed at least once every two years (within the agreed PMDS cycle), with informal meetings between the reviewee and reviewer encouraged throughout the PMDS cycle. Reviews can be staggered throughout the two year period and scheduling of reviews should take place when the cycle commences.</p> <p>The reviewer should ensure that all learning and development requests are forwarded to the HOS/U for approval on a regular basis (every 6 - 8 weeks). The amalgamated authorised learning and development actions should be forwarded by the HOS/U to the PMDS co-ordinator (pmds@ucd.ie) for action every two months. Both the reviewer and HOS/U should note that retention of PMDS Forms 2 & 3 and failure to submit learning and development requests for action, in a timely manner, can have a significant impact on a staff member's access to learning and development opportunities provided by the university.</p> <p>It is the responsibility of each HOS/U to keep an up to date record of reviews completed in their school/unit. At the end of the two year PMDS cycle each school/unit will be requested to submit a record of all reviews completed during this period.</p>
Name of Head of School/Unit:

Any further comments or requests:

SECTION 2: SIGNATURES CONFIRMING INFORMATION COLLATED

The signatures below indicate that the reviewer has amalgamated the learning and development actions of their reviewees for the next PMDS cycle. The reviewer will bring these actions to the attention of the HOS/U for consideration. All information on this form is confidential and only agreed actions such as learning and development actions will be shared in order to ensure that they are addressed.

Reviewer's signature: _____

Date: _____

Authorised by HOS/U (this signature indicates that the HOS/U has considered the learning and development actions for the above reviewees and has notified the reviewer of the decision made. It also implies the HOS/U is aware of the cancellation fees for staff who cancel their places on training programmes provided by Learning & Development units in UCD).

Head of School/Unit signature: _____

Date: _____

Section 3: SIGNATURE CONFIRMING FEEDBACK TO REVIEWEES

Having received the authorised version of this form, the reviewer must sign below.

Reviewer has informed each of his/her reviewees of the decision made by the HOS/U.

Reviewer's signature: _____ **Date:** _____

The reviewer should retain a copy of this form confidentially.



UCD PMDS

**Form 3: Summary of Reviews Completed
and Authorised Learning & Development Actions for School/Unit
(HOS/U → PMDS co-ordinator)**

(To be completed by the HOS/U)

Please refer to the UCD PMDS Guidelines; School/Unit Strategy; Learning and Development Directory and completed Form 2s before completing this form.

The purpose of Form 3 is to indicate those reviews which have been completed in the school/unit and to amalgamate the learning and development requests authorised by the HOS/U.

All learning and development actions are authorised at this stage by the HOS/U and the reviewers and reviewees informed of what will be provided. The HOS/U will send the completed and signed form to the PMDS co-ordinator at pmds@ucd.ie who will collate this information and follow up on learning and development actions. The amalgamated authorised learning and development actions recorded on this form should be forwarded by the HOS/U to the PMDS co-ordinator (pmds@ucd.ie) for action every two months. Both the reviewer and HOS/U should note that retention of PMDS Forms 2 & 3 and failure to submit learning and development requests for action, in a timely manner, can have a significant impact on a staff member’s access to learning and development opportunities provided by the university.

Signed copies of this form will be sent to the College Principal/Vice-President & HR Partner (where applicable) for information purposes.

Please complete this form in full and if something is not applicable please mark N/A.

Name of Head of School/Unit:
Period covered by this document:
Date:
Name of HR Partner (where applicable):
Name of College Principal/Vice-President:

SECTION 1: SIGNATURES

Authorised by HOS/U (this signature indicates that the HOS/U agrees that these learning and development actions will be carried out):

Head of School/Unit signature: _____

Date: _____

SECTION 2: SUMMARY OF REVIEWS COMPLETED AND AUTHORISED LEARNING & DEVELOPMENT ACTIONS

Please complete Section 2 (overleaf), which shows the name, personnel number, UCD contact number or email and date of review for each reviewee. This section also summarises the authorised learning and development for each reviewee. Cost centre information is required. In the case of a cancellation from a training programme the school/unit will be charged a cancellation fee. This information is taken directly from authorised training actions on Form 2 from each reviewer in your school/unit.

