

11.1 PMDS

Introduction to PMDS

The System of Performance and Development Management which was introduced into Teagasc in 2003 was renewed in 2008, 2013 and again in 2017. The aim of the PMDS process is to provide you, the staff member, together with your manager the necessary tools to manage and improve performance. When commencing the PMDS process you will have to consider the following:

- What is the purpose of my job?
- What are my objectives for the year ahead?
- Review how am I getting on?
- Consider how can I develop and improve?
- How can I apply for future learning and development programmes for my future career development?

PMDS has a significant impact on the way we in Teagasc manage our business and develop the people who work in it. On an annual basis, PMDS helps you to clarify your role and set specific objectives in the context of your unit's business plan, which in turn is linked to the goals and objectives in the Teagasc Statement of Strategy.

During the year, PMDS provides a forum for discussion with your manager regarding your role, in particular, how you are getting on, to address concerns, and to provide an overall assessment of performance against objectives. It establishes your developmental needs and links these to your current role in Teagasc so as to optimise the immediate benefits for you through various developmental initiatives. It also allows you to address your future development needs and provides an opportunity for you to give feedback to your line manager on the running of the business unit.

The two main purposes of PMDS are:

- (1) to provide a scheduled opportunity to promote a two-way discussion between you and your manager
- (2) to provide a planning and feedback tool in relation to your role and your development.

All staff throughout Teagasc are required to participate in this system and line managers have a particular role and responsibility for quality assurance and for ensuring that objectives set are clear and equitable in the context of the business unit objectives, your role and the expectations of your grade and competency level within that context.

The Annual Cycle of PMDS

The Business Planning and PMDS cycles are intrinsically linked in Teagasc. PMDS is facilitated via two formal meetings in a year. The first and most substantive meeting combines two stages of the process, Stage I and Stage III. This meeting is in part a review of the outgoing year and in part a planning for the upcoming year. Thus, this meeting should be held in November or December each year.

The System operates on a yearly basis in three stages:

Stage I - Planning:

In association with your line manager and in the context of your unit's annual business plan, you will complete a PMDS form. This will mean you setting out the purpose of your job identifying and agreeing your key objectives together with the tasks required to achieve each objective and the dates for their completion for the year ahead. .

Following discussion with your Line Manager you will understand the expectations for your grade and role.

The PMDS Planning meeting will also facilitate a discussion between you and your Line Manager to achieve your objectives by identifying any gaps in key competencies (i.e. knowledge, skills and attributes) that are required to perform your job or, in the alternative, new competencies that may be need to be developed. Using the Teagasc [Competency Framework](#) will greatly facilitate this task. You will consider your strengths, your achievements in the last year and the areas that require further development. Together you will decide on the best way to facilitate your learning and development i.e. whether through training or other appropriate methods (e.g. coaching, mentoring etc.).

The Learning and Development Plan should be tailored to your particular needs. This discussion should focus on both current training needs and your more long term career development. You are also encouraged to identify one job related improvement that you are going to progress. Although some of these may be considered of a minor nature they may create significant value add for the organisation.

Stage II – Interim Review:

Informal reviews of your PMDS Plan should occur on an ongoing basis throughout the year with feedback and coaching forming an integral part of the process.

Six months into the annual PMDS cycle you and your line manager will meet to carry out a formal review of progress to date. This is known as the interim review. . Having set out your progress achieved to date for each objective together you will review progress, consider any changes which may have occurred in your objectives, the competencies identified will be reviewed and the effectiveness of your Learning and Development Plan in meeting your particular needs. Any adjustments required to your objectives will be made and reflected on your PMDS form and signed off by you and your manager.

Should there be a concern with regard to a staff member's performance or attendance it is vital that the line manager addresses this as soon as identified and not to be 'saved up' for the interim review stage. A Positive Action Programme (PAP) to support the staff member in achieving their objectives may be required (see Positive Action Policy – Section 4.2). The Positive Action Programme will operate in parallel with PMDS e.g. the staff member may be required to engage in monthly meetings under the PAP process in addition to the PMDS process. The line manager should contact the HR Department with regard to implementation.

The interim review stage requires you to carry out a self-assessment so as to review objectives set, your performance to date in achieving your objectives and your learning and development plan. This self-assessment should be completed in advance of meeting with your line manager. An interim review meeting should take place and any changes to the above should be discussed and agreed at this meeting. The meeting should conclude with you and your manager signing off on the interim review stage of PMDS.

Stage III – Annual Review:

A formal Annual Review will take place at the end of the PMDS cycle (i.e. 12 months after Stage I) where you and your line manager will review your performance in relation to the objectives, tasks, competencies and learning and development plan agreed at the start of the

year and any revisions made at the interim review stage. This two-way discussion will normally remain confidential between you and your line manager unless a performance related issue occurs within the PMDS year which requires further intervention and potential involvement of the Human Resource Department and other relevant experts.

The Annual Review is an integral part of the PMDS process in providing you with an opportunity to reflect with your manager on your performance over the past year and build further improvements into your performance for the year ahead. There should be no surprises here.

Again you are required to carry out a self-assessment for the annual review considering the objectives set, your performance to date in achieving your objectives, your learning and development plan and your interim review assessment. This self-assessment should be completed in advance of meeting with your line manager. The discussion will focus primarily on an assessment of the attainment of the key objectives set for the year but will also offer scope to acknowledge other contributions. Good performance will be acknowledged and where appropriate, actions needed to help build on performance will be identified. In this context both parties will indicate where you did particularly well over the year and areas where there is potential for change and development. The latter will be brought forward into Stage I, the planning stage for the upcoming year.

In addition, an overall assessment of your performance will be agreed and one of the following ratings will be awarded:

- Achieved expectations – you will have fully met or exceed all of the role requirements and required standard and performance is at a fully acceptable level in all essential areas
- Or
- Needs improvement – you have met some role requirements to required standard but performance has fallen short in some respects. Referral to a Positive Action Programme will apply.

The Final Review provides you with the opportunity, on a voluntary basis, to give feedback to your manager on how you are being managed and the running of the business unit or other related issues. On the Final Review Form you may indicate your suggestion(s) for improving the performance of the business unit and your Manager will, in response, indicate his/her comment and/or an agreed action.

Appeals Process

The staff member or the line manager has the right to raise an appeal at any stage of the PMDS process.

Full details of this process are available on the [PMDS](#) section of the Tnet.

Key Competencies

A [Competency Framework](#) has been developed in partnership with staff from all sections in Teagasc. These profiles are available for use in your PMDS meetings. Using the profiles will provide a consistent and transparent tool for assessing your existing skill set against the competencies for your current role and any promotional role that you may aspire to. This will allow for a more meaningful dialogue between you and your line manager in your PMDS meetings.

Training on PMDS

On an on-going basis, new staff will receive PMDS induction training to prepare them to engage with the process. All aspects of the system including completing the relevant forms and identifying the competencies required for the job will be covered in the training. Induction training will be available to newly appointed managers to help them manage and facilitate the process effectively. PMDS support material is available on the T-net including an e-tutorial.

Version	Revision Date	Summary of Changes	Policy Owner
1.0		n/a	Staff Training