



Inductions & Onboarding

Information for Managers

If you're recruiting for a new role:

1. Create a PD using [this template](#). If you have any questions or want to chat about the finer details, get in touch with the Director of People & Culture
2. Email the PD **in PDF format** to volunteer@oaktree.org
3. If it's a leadership position, or needs to be filled super-urgently, it will be put up on oaktree.org/volunteer. Roles in other states will go up on oaktree.org/volunteer_state

Once you've found this stellar new volunteer:

1. Email volunteer@oaktree.org to let us know and we can take down the PD from the website and stop sending it around to potential applicants.
2. Induct the newbie with our on-brand and strategically aligned induction materials found at oaktree.org/you. **Inductions are the most important part of the volunteer journey. Outlined below are all the steps for a really great induction.**

Inductions

PHASE 1: ORIENTATION (completed within the first 2 weeks)

Welcome!

- Outline the induction process and briefly, what they should expect of Oaktree
- Tour of the office
- Introduce your new recruit to ALL other volunteers (not just team members) - *consider an Ice Breaker at the next WTM*

Admin and Registration

- Fill out the [Registration Form](#) including signing Oaktree's Code of Conduct
- Create a Google Doc of Contacts – all the essential people they are likely to need to be in touch with in their role.
- Set them up with their Oaktree email *and* make sure they're on the right mailing lists

Oaktree Orientation

- Go over the **Welcome to Oaktree!** Powerpoint with the new recruit
- Go over the **Overseas Impact** Powerpoint
- Ensure volunteer has a copy of the **Oaktree Welcome Pack** and have them read it before the next induction meeting
- If necessary, ensure volunteer has a copy of the **Manager Pack**
- Do a **Brand Training Session** and ensure that they are familiar with both the [visual](#) and [non-visual style guide](#)



- Discuss the roles of the State and National teams, including what they're responsible for, how they work and what the relationship is between the two

Role Orientation

- Review the Position Description, and clarify any questions or comments
- Set expectations regarding:
 - Time commitments (including 'extras' like WTM, National Conference, Retreats and Training)
 - Reiterate that we all value and prize life-work balance, and People and Culture are around to support volunteers
 - Introduce and identify opportunities provided for growth and development
 - Emergers
 - Our Generations Challenge
 - Performance Reviews
 - Identify who they will be work closely with and make sure they been introduced
- Before the next phase of the induction, have volunteer set some goals for themselves, which can be incorporated into a roadmap and goal setting session later

PHASE 2: SETTLING IN (completed within the first month)

Debrief

- Check up on how the volunteer is settling in
- Invite them along to any upcoming social events

Work Dynamics

- Consider having your volunteer take the following to better understand working and learning styles
 - Myer Briggs personality/working styles test
 - North, south, east, west test
 - Multiple Intelligences Test to discern how they learn best
 - <http://www.businessballs.com/howardgardnermultipleintelligences.htm>
 - VAK (visual, auditory, kinaesthetic) test for the same reason
 - <http://www.businessballs.com/vaklearningstylestest.htm>
 - Is there anyone they'd like/need to meet in their role?

Goal Setting

- Leave the volunteer with a copy of their Professional Learning Plan. Have them fill this out before the final stage of their induction, which will focus on this plan and making it together
 - (<https://docs.google.com/a/theoaktree.org/document/d/1VljX3eYwsH2LOK8ZiVfVnZpAMyfo5S5LwpqkaTthMWU/edit>)
 - For ELT - (<https://docs.google.com/a/theoaktree.org/document/d/1QZ3VGoKlmbVKzUaZQUH6XAGijpV7xTb3n6vefazB9YE/edit>)



PHASE 3: UP AND RUNNING (After 1 month)

Goal Check-in

- Sit down with volunteer and go over their Professional Learning Plan
 - Does it need to be revised in any way?
 - What actions can we set now to ensure these goals can be reached?
 - What will the next 1, 3, 6 and 12 months of your role entail?

Any questions?

About any of the steps or resources for inductions, contact **Emily Edwards** | Executive Assistant for People & Culture | e.edwards@oaktree.org

About the People & Culture, recruitment or the personal and professional development of volunteers, contact **Meg Brodie** | Director of People & Culture | m.brodie@oaktree.org