



**Oaktree Performance Reviews**  
March – April 2014



## The Purpose

At Oaktree we are value-driven and impact-oriented. We seek to create an environment where we bring the best version of ourselves to our work in leading the movement to end extreme poverty. Moments for reflection and review enable us to grow as individuals and as an organisation.

Performance Reviews are an opportunity for us all to pause and reflect on our work over the last few months. It's a process that enables us recognise and celebrate success, identify our strengths and areas for growth, and work out how we can improve in order to reach our potential and maximise our impact.

At the end of the process, volunteers should feel purposeful in their work and keen to engage in opportunities for ongoing learning and professional development.

## The Process

There are 3 important components to performance reviews. It's a pretty straightforward and painless and you'll be guided through each of the steps by your manager and the P&C team.

### **1. Prebrief & Self-reflection** *completed with manager*

In a conversation with your manager, you'll have the chance to reflect on your goals or KPIs over the last couple of months share your thoughts on how you feel that you've gone. It's a chance to reflect on your performance – your achievements, challenges and outcomes. You'll then be able to fill in the Self-reflection survey where you will also identify the people who should be involved in your performance review, including your manager, peers and direct reports.

### **2. 360° Survey & Report** *completed by peers, managers and teams*

After you have completed the Self-reflection element, the 360° Survey will be sent to the people who you identified for your review. The survey is a professional development tool that's used to gather perspectives of your work performance, focusing on our values, key leadership and management skills as well as team impact. Once feedback is gathered, it will be compiled to form your Performance Review Report.

### **3. Debrief & Professional Learning Plan** *completed with your manager*

Your manager will receive your Performance Review Report, prior to the Debrief. The Debrief is an open conversation with your manager. Drawing on the Performance Review Report, the purpose of the conversation is to celebrate achievements, reflect on areas of growth and put in place strategies to achieve further development goals. The outcomes of this conversation should be documented using the Oaktree Passport Learning Plan, including the professional development goals, how they will be achieved and a timely plan for measuring success. There's an online form that will need to be completed at the end of the process.

## Performance Reviews and the Passport

### We're shaking things up.

At Oaktree, we've used this performance review process for a number of years – and it's proved to be one of the most tangible ways of identifying areas for growth and developing personal and professional learning goals. Making these goals, however, is only the first step in the journey – we need to ensure that we are consistently working towards them and measuring our success. The Passport will enable us to do this.



## A sneak peak - tell me more about the passport.

The Oaktree Passport will facilitate the personal and professional development of all volunteers - and track their progress against goals and KPIs. We already know that being an Oaktree volunteer is about more than fulfilling a certain role - for many it's a transformative experience, by the nature of the challenging and rewarding work that we do and the unique and passionate community we are a part of. The Oaktree Passport enables us to ensure that the Oaktree volunteer experience is one of learning, growth and impact.

Through the Passport, Oaktree volunteers will be able to consistently reflect on their own growth and be deliberate in seeking the training and resources they need to succeed in their roles. There are three components to the passport:

### **1. The Passport Benchmarks** *delivered through a thorough induction*

The Passport Benchmarks will define and track the skills, knowledge and attributes that all volunteers need to be equipped with. They represent the generic skills such as communication, facilitation and Oaktree Organisational knowledge that are necessary in all volunteer roles. Over the course of the first 6 weeks of all Oaktree volunteer journey, they will be provided with the resources they need to fulfil the benchmarks - to ensure that volunteers are equipped to fulfil their roles right from the word go.

### **2. The Passport Learning Plan** *delivered through a thorough monthly check-ins*

Reflecting on the P&C areas of focus outlined in the Passport (Leadership, Learning, Community and Impact), every Oaktree volunteer will create their own Passport Learning plans, which will facilitate their individual growth and development. Volunteers will develop and discuss their Passport Learning plans during a Check-in every 4 weeks. A Check-in involves a 30 min face-to-face between a volunteer and their ASD or manager (for national team) to talk through their KPIs, challenges, wins skills, strengths and weaknesses as well as personal and professional goals.

### **3. Online Tracking**

The progress of volunteers against the benchmark skills and knowledge (as delivered on induction), as well as their individual learning, will be logged and tracked through an online platform - to enable the tracking and quality assurance of the volunteer experience.

## How do Performance Reviews fit in?

Performance reviews are an excellent tool for personal and professional development, but they only come around every 6 months. Performance Reviews fit into the passport in two key ways, which will enable us to maximise them as a key tool for ongoing learning and growth.

1. The performance review report will form the basis of one check-in every 6 months and add significant value to the **Passport Learning Plan**
2. The outcomes of the performance review (the Report and resulting Learning Plan) will be logged on the Online Platform,



## Guide (for managers)

A 360 survey is a useful tool for collecting and evaluating performance – but in its self it's not a performance review. It's the conversations surrounding the survey and the report that make this process meaningful for volunteers. As a manager, you will play a crucial role in guiding your team through these conversation, allowing your team to make sense of the feedback provided and form learning and development goals based on this and their own personal reflections. This is achieved in two conversations: the Prebrief and the Debrief. Everything you need to know is right here.

It is important that these conversations are approached with warmth, confidentiality and a genuine desire to advance progress. And as such, they are the first of many opportunities for managers and relevant support staff to provide ongoing feedback and tailored interventions to support the development goals of our volunteers.

### The Prebrief (20-30 minutes)

The purpose of the Prebrief is to ensure that volunteers understand the purpose of performance reviews and how the process will unfold. Set the expectation that this is a chance for open and honest reflection and conversation, with the purpose of the celebrating successes and recognising the challenges of the past few months in their role. It's also an opportunity to begin to develop an understanding of individual strengths and areas for growth.

1. Explain the performance review process and clarify any questions.
2. With the volunteer, develop a shared and thorough understanding of their key goals and KPIs over the last 4 months.
3. Share reflections on how you feel you both feel the volunteer went in working towards those goals. Some questions to consider:
  - a. Where did we start (X) months ago?
  - b. What did we do to work towards our goals/fulfil KPIs?
  - c. Do you feel you were successful? Why/why not?
4. Share reflections on the challenges and successes over the past few months.
  - a. What achievements are you most proud of?
  - b. What are some challenges that you faced?
5. Discuss the personal and professional development of the volunteer.
  - a. What tasks/responsibilities have you found most challenging?
  - b. What do you want to learn now? How do you want to grow?
6. Volunteers should complete the Self-Reflection Form immediately after – this will inform the 360 Survey.



## The Debrief (45 minutes)

The goal of the Debrief is to help volunteers digest all the information that's coming their way in the review and identify actionable areas for change, improvement and development. At the end of the review, you should have a plan with to improve or change key behaviours and develop new skills – documented in the Professional Learning Plan.

Before the Debrief ensure that you're familiar with the report and its contents, thinking about how the volunteer might respond to the feedback that's given. If you have any questions or concerns please chat to Meg Brodie.

1. Introduction - Purpose of performance review and debrief is explained (please refer to this guide); questions are clarified
2. Encourage the participant to share their self-reflection; managers should also contribute their reactions to their reflection
3. Briefly describe how the performance review report is structured (please refer to this guide)
4. Hand over the report and invite the recipient to skim-read it – ensure that the report is handed only DURING the meeting, not before or after
  - Managers and reviewed individuals to share overall reactions, and all strength areas/development areas are to be reviewed
  - It is imperative here to emphasise the purpose of review as a tool for growth, not as an audit for poor performance, etc. When communicating numerical scores in particular, please ensure that these are entirely absolute and not in relative performance to other individuals. We recognise and value every individual's circumstance is difference
  - However, all areas of growth are to be communicated in a direct manner and concerns are to be clarified.
  - We want the participants of the review to feel empowered in their work and leave the Debrief wanting to learn and grow more.
5. Identify actions and create a **passport learning plan** (see below for the template)
6. Discuss how you can work together better – based on the feedback in the self-reflection, is there anything that you can change about the support you provide that would improve performance?
7. Negotiate how and when you will follow up and check progress
8. Ask for feedback on the review process, debrief and professional learning plan
9. All managers to circulate feedback of review process and a copy of the professional learning plan to [m.brodie@theoaktree.org](mailto:m.brodie@theoaktree.org). This information, of course, is also kept confidential.

If there are any significant concerns that arise please communicate these immediately to [m.brodie@theoaktree.org](mailto:m.brodie@theoaktree.org)



## The Passport Learning Plan

Name:	Role:	Date:
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<p><b>1. Identify your strengths:</b> What do you think are your core strengths? What strengths were identified in the review?</p>	<p><b>2. Areas for development:</b> Where does feedback suggest that you have some opportunities for improvement?</p>
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**4. Prioritize your strengths and development needs.**  
What are your priorities in the next 6 weeks and what do you think the challenges will be?

Which strengths are most important in contributing to your ongoing success in my role?

Which development need will be most critical in your role in the coming months?

### 5. A Learning Development Plan – Develop SMART Goals

Professional Development Goal/Outcome to be achieved	Action Plan (what steps will be taken to achieve it)	Resources (who or what will help you get there?)	Indicators of Success	Timeline & Review date

**6. Follow-up & Check-in**

How will I measure my success?

What will the follow-up process be? When will our check-in be?