



## The Oaktree Passport Information for ELT



## Context

It's the people that make this organisation tick. Our volunteers are our most valuable resource, giving over 2600 hours each year. It's their incredible hard work, creativity and resilience that enables Oaktree to achieve impact on the movement to end poverty.

We have big plans for 2014. In order to make it happen we need to ensure that our volunteers are equipped with the skills, knowledge and attitudes that they need to achieve their goals. The Oaktree Passport will enable us to do this.

## Introducing the Passport

The Oaktree Passport represents a framework aims to track the skills, knowledge, attitudes and impact of Oaktree volunteers. In its implementation we aim to facilitate a positive volunteer journey, by ensuring that we effectively invest in the personal and professional development of every volunteer. 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 Benchmarks

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. They will be delivered through 4-5 induction modules and their completion will be tracked online through "My Passport".

### 2. Check-ins

Every month, volunteers will have a check-in with their ASD or manager (for national team). A check-in is a half-hour conversation to discuss volunteer performance, learning and growth. Their primary aims are:

*For volunteers -*

- a. Reflect on wins, challenges and their performance against KPIs
- b. Identify strengths and areas for growth in the context of upcoming priorities
- c. Have a clear understanding of how to work towards their professional learning goals and feel empowered to invest in their own learning and growth

*For managers/ASDs -*

- a. Create space for reflection and feedback
- b. Identify gaps in knowledge or skill in individual volunteers and teams

*For Oaktree -*

- a. Ensure that all volunteers are equipped with the Benchmarks
- b. Track volunteer performance against KPIs
- c. Track skill and knowledge development across the volunteer base
- d. Track volunteer participation and impact in org-wide priorities and campaigns

ASDs and managers will be provided with a Check-in Guide to work through with their volunteers. In the check-in, they will have to update the Volunteers individuals Passport (see below for a mock-up of My Passport) and fill in a google form for data capture.



### 3. Online Platform

Tracking and volunteer interaction with the passport will be facilitated through the online platform. [Oaktree.org/passport](https://oaktree.org/passport) will serve as the passport home page. It will contain links to the induction modules, resources and opportunities for ongoing learning, as well as the other essentials in the volunteer journey, including finance and admin info, as previously hosted on oaktree/you. Volunteers will also be able to access the personal portfolio - [My Passport](#). This is their personal log of their volunteer journey. It will document:

- a. Their completion of the Benchmarks and induction modules
- b. Their KPIs and current priorities
- c. Reflections and achievements
- d. Their level skill and knowledge across key areas
- e. Learning and Training they have received
- f. Leadership opportunities they've been a part of
- g. Current learning and development goals and how they will work towards them

## What does this mean for me?

**As an Oaktree volunteer**, come March 17, you'll get your own passport. It will look something like this - [My Passport](#). Within the next month, you'll have your first check-in with your manager. Together, you'll reflect on your Oaktree journey so far, identify the skills and knowledge that you currently possess as well as those that you have room to grow in for your role. You'll formulate learning goals and an action plan as to how you will work towards them in the coming months, including pointing you to resources that you can draw on. You'll have a Passport check-in once a month to track your progress and ensure that you have everything you need to support your continued learning and growth – across your whole Oaktree Journey.

Having a Passport means three really great things. Your Passport will:

1. Enable you to invest in your own personal and professional development.
2. Provide you with awesome resources, access to internal and external training sessions, and expertise to do so.
3. Hold you accountable to doing the best you can in your role, ensuring you have the greatest impact on the movement to end extreme poverty.

### **As a manager, it will be up to you to guide your teams through this same process.**

Firstly, you'll need to set aside half an hour for a Passport check-in with each of your team members (*national team only – state-based team members will check-in with their ASD*). In this first check-in, you'll need to:

1. Establish a shared understanding of what their KPIs and priorities are, and log this into their passport.
2. Talk about the skills and knowledge that they current possess (focusing on the Benchmarks), and logging this into their passport
3. Discuss what the next couple of months look like for them in their role and what challenges might be coming up.
4. Establish what kind of skills and knowledge they may need to meet these challenges and excel in their role.
5. Identify 2-3 learning goals, and an action plan as to how they'll be working towards them over the next month.
6. Fill it a google form, for P&C data capture.
7. Schedule your next check-in



You'll receive a detailed outline of what a check-in looks like, a script and check-list for you to follow, as well as some essential resources that will help you set learning goals with your team before March 17.

Facilitating check-ins is the only official Passport related duty that you'll have as a manager, but it's important to remember that the learning doesn't happen in that half-hour, once a month. It's an ongoing process. A check-in is essential time and space to reflect, evaluate and ensure that the volunteers feel supported in their learning and development. Outside of that time we need to ensure that we deliver on that support and create a culture where we're all *hungry to learn*.

## Frequently Asked Questions

### **What resources do we have to support volunteers achieve their learning goals?**

The ongoing growth and development of volunteers will be supported through a variety of other resources and initiatives (as each volunteer will have different needs) such as:

- The modules that cover the Benchmark skills
- Existing programs such as OGC and Emergers
- Resources for ongoing learning as available on [oaktree.org/passport](https://oaktree.org/passport) in specific skill areas – facilitation and management developed by P&C or relevant initiative team (i.e. community leaders or IE)
- People – we have some pretty amazing people at Oak, with some unique and valuable skill set, and one way of learning is through simply having conversations with someone who knows stuff!
- External Training opportunities – look widely for these. P&C has some budget for supporting volunteers in being able to access these. Get in touch if you find an excellent opportunity and want to explore funding options.
- Practice, Practive, Practice – for skills like public speaking, facilitation or pitching, it's learning by doing that's the key. Create time and opportunities for volunteers to give things a crack.

We want to grow the resources that we have on hand and the P&C team will gladly help you seek resources to enable your team to meet their goals – get in touch!

### **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,

### **So many more questions...**

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