



# The Oaktree Passport – Check-ins

We just launched the Oaktree Passport – a framework to facilitate the personal and professional development of all volunteers. **As a leader and as a manager, you'll play an important role in the Passport journey for your team.** Every month, you'll need to facilitate a Passport Check-in with each of your direct reports.

## What is a Check-in?

**Passport Check-ins is a half hour conversation between you and your team members, focusing on their performance, learning and growth.** Their main purpose is to create a professional learning plan together. This is a set of 2-3 critical learning goals and clear actions, resources and opportunities identified to achieve them, that will ultimately enable your team member to bring the best versions of themselves to their work at Oaktree.

Having a regular check-in is one of the most important parts of the passport. At Oaktree, we don't often take the time out to critically reflect on how we're working towards our big picture KPIs – and how we need to learn and grow in order to continue to have the biggest impact possible. It's essential that we take the time out regularly to do this, to ensure that we're consistently and strategically investing our personal and professional development. **This is why check-in happen once a month, every month.**

## What does it look like?

We know that every team is different and everyone works, learns and grows differently, so it's up to you exactly how you want the check-in to flow; however there should be the same principles guiding every check-in and there are a couple important points to cover.

### In essence a check-in is all about:

- Being open and honest
- Creating space for reflection and recognition
- Looking to the future with purpose and energy
- Being hungry to learn – and taking ownership of learning

### At the end of the conversation, you should have:

- Reflected on recent performance and learning
- Established if the volunteer is equipped with the benchmarks
- Discussed KPIs, upcoming priorities and how they're tracking towards them
- Identified key areas for growth and developed associated learning goals
- Created an action plan for each learning goal, including resources, opportunities, indicators of success and an appropriate time frame
- Ensured that their passport is up to date
- Filled in the google form (for tracking purposes)
- Set a date in one month's time to check-in again



## A conversation guide

We've given it a crack, and here's how the conversation flowed. You can use this as a guide for your first check-in.

### 1. Getting set up and the Benchmarks

- Open up your team member's Passport and [enter in any of the details that are still missing, including personal info and KPIs](#) (it's good to have a shared understanding of these before the check-in)
- Establish where the volunteer is at with the benchmarks and [record them as red/green in their Passport](#)

### 2. Reflecting on the last couple of months

- Provide space to reflect on performance and impact over the last couple of months, using questions like:
  - How do you feel that you gone in working towards your key KPIs?
  - What have been some wins that you're proud of?
  - What has been challenging?
- Reflect on the learning and opportunities that they've explored and the skills and knowledge that they've acquired and [log these in their Passport, in "My learning log"](#)
  - This can include any trainings or retreats that they've attended, meetings with mentors or their own reading and research

### 3. Thinking about impact and priorities moving forward

- Look forward to the coming months and identify upcoming KPIs and priorities. [Log these into your Passport](#). Use questions like:
  - What does the next couple of months look like?
  - What will your operational and strategic priorities be?
  - What are the key milestones that you're working towards?
  - What might you find challenging?

### 4. Understanding strengths and areas for growth

- Work out what strengths and areas for growth are important to them in the context of upcoming priorities and challenges. Think about questions like:
  - What strengths and skills do you think are important in your role right now?
  - Where do you have the most room to grow?
  - What do you think is your leadership style? How does this help/hinder you?
  - What skills and knowledge would be valuable to you?

### 5. Creating professional development goals

- Create goals and actions using the template provided in the passport – [and log these in](#). There are a lot of different methods for setting goals, but think about:
  - What are the 2-3 most important learning areas to you?
  - What resources – reading material that's on [oaktree.org/passport](#), Oaktree or external opportunities, opportunities for practice and feedback, people or 'internal experts', mentors etc – will help you get there?
  - How will you know when you've succeeded? What does that look/feel like?

### 6. Recap actions and fill out the google form.



## Finding resources for Learning

Every volunteer is going to have different goals and different needs. Although the onus is really on the individual to be proactive in seeking out opportunities and resources, the P&C team is here to support you. At the moment, the ongoing growth and development of volunteers will be supported through a variety of other resources and initiatives 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](http://oaktree.org/passport) in specific skill areas – facilitation, development, management, leadership and self-awareness
- People – we have some pretty amazing people at Oaktree, 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, Practice, 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!

## Any questions

Don't hesitate to get in touch. Contact **Meg Brodie** | [m.brodie@oaktree.org](mailto:m.brodie@oaktree.org) | 0438 703 494