

Informal Mentoring Toolkit for Managers and Supervisors

Overview

Introduction

In support of the Informal Mentoring: *Share What You Know* initiative, the Human Resources Division (HRSD) is requesting that front line managers and supervisors reinforce the concept that informal mentoring is valuable to the organization as well as individuals, and can easily be incorporated into everyday activities.

Contents

This section contains the following topics:

Topic	See Page
Informal Mentoring Toolkit for Managers and Supervisors	3
Resources	8
CalPERS Taboo Icebreaker Activity	10

Continued on next page

Overview, Continued

Background— the Informal Mentoring: *Share What You Know* initiative

The Informal Mentoring: *Share What You Know* initiative is an effort to expand on and reinforce the ways CalPERS empowers employees at all levels to seek opportunities for learning and career development. Beyond employee retention, a culture rich in informal mentoring opportunities also benefits employees because it:

- Allows for learning about other areas of the organization and gives mentors and mentees a more global perspective
- Builds knowledge sharing across the organization
- Enhances opportunities for professional and personal development
- Capitalizes on the breadth of experience in our diverse workforce
- Elevates knowledge transfer from information transmittal to the capture of practical experience and wisdom

In addition to the ideas and activities found in this toolkit, informal mentoring can be accomplished many different and very simple ways. Some examples of informal mentoring include:

- Meeting over coffee or lunch
- Participating on cross-functional or cross-divisional teams
- Going for a wellness walk or other break with an informal mentor or mentee
- Providing opportunities for job shadowing

Purpose of toolkit

This document includes suggestions for ways to feature informal mentoring in casual settings as well as incorporating it into structured activities. The toolkit is intended for managers/supervisors to incorporate informal mentoring into their daily interactions with employees.

Acknowledging that not all suggestions or activities are well-suited for all work environments at CalPERS, you are encouraged to tailor the tools and resources to best fit your needs.

Informal Mentoring Toolkit for Managers and Supervisors

One-on-one career development conversations

Recognizing managers/supervisors are often pressed for free time in their schedule, one suggestion is to use five to ten minutes of time already set aside for regular one-on-one meetings with employees to discuss career development goals they set for themselves that are represented in their Employee Performance and Development (EPAD).

As a manager/supervisor, you are encouraged to:

- Start the conversation by asking if the goals in the EPAD are still valid
- Discuss any new training that could be added to the plan
- Ask employees if their career development goals have changed or if there is a new area of interest they would like to address
- Continue to revisit career strategies during subsequent one-on-one meetings
- Provide continuous support for your employee's professional goals and development

Highly visible project work

Sometimes, when new projects are assigned to a unit, the manager will assign them to employees based solely on skill and workload availability. To provide additional opportunities to diversify their workload, you can present new projects to employees as “career development opportunities” that might help them get noticed by a unit or division they are interested in. This will support employee's professional development as well as introduce them to new scopes of work within the organization.

As a manager/supervisor, you are encouraged to:

- Learn new skills that might help them gain knowledge of a unit or division they are interested in
- Develop skill sets that may help them be competitive for positions in that area

NOTE: Managers/supervisors are encouraged to send an email to employees explaining the details of new projects as they come in and how it would be a wonderful career development opportunity for anyone interested.

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Informal Mentoring Toolkit for Managers and Supervisors,

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Open office hours

Often, employees have multiple competing priorities and don't have many opportunities to interact with their manager/supervisor outside of project or regular workload meetings. By scheduling monthly or bi-monthly open office hours, employees can discuss career development opportunities, project work, and build a working connection with their manager/supervisor.

As a manager/supervisor, you are encouraged to:

- Block off an hour or two once a month or every other week and let your employees know that you are available in your office or another onsite location for an impromptu meeting
 - Send a meeting notice to your employees so the time appears on everyone's calendar and stay committed to the time
 - Tell employees you are available to talk about anything, this time is for them to use as they see fit
 - Encourage employees to come individually or in a group, whatever makes them feel more comfortable
 - Consider playing music, or bringing treats, and hanging a sign on your wall to let employees know that you're available
 - Be flexible on location – remember open office hours can happen anywhere (e.g. your work space, outside, walk and talk, break room, etc.)
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Share success stories

Most managers have had the opportunity to witness colleagues make the transition from analyst to manager. Another way to support the Informal Mentoring: *Share What You Know* initiative is for managers to share successes they have observed of others whether that person is a friend, a co-worker, or even a past employee. In a one-on-one meeting or perhaps over a cup of coffee, share with your employee who is interested in promoting about another person you have seen successfully make the transition from analyst to manager.

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Informal Mentoring Toolkit for Managers and Supervisors,

Continued

Share success stories (continued)

As a manager/supervisor, you are encouraged to:

- Share your experience transitioning from an analyst to a manager position, or tell the employee about a promotion you have observed (e.g. challenges you faced, positive experiences you had, etc.)
- Talk about training that was helpful in your own preparation to become a manager and training you found to be valuable after the transition
- Explain your experience (if any) with mentoring. Did you reach out to a mentor? If so, how did that help you?

Talk about what opportunities you took advantage of and some pitfalls to avoid

Meeting mentoring week...all year round

In order to increase the number of opportunities for employees at all levels to connect with managers and supervisors from across the organization, consider inviting one of your employees to accompany you to one of your meetings. This is a great opportunity for employees to be exposed to and learn more about other parts of the organization and make networking connections they might never have had access to before.

As a manager/supervisor, you are encouraged to:

- Invite employees to a meeting outside of their current role or responsibilities
 - Invite an employee to all or part of a project or other working meeting, participate in brainstorming sessions, take notes during planning sessions, and participate in non-confidential activities
 - Invite an employee to a committee meeting such as:
 - Diversity and Inclusion
 - Susan G. Komen for the Cure
 - March of Dimes
 - Interdivisional event committees, (e.g., the Career and Education Fair and the Chili Cook-off committee)
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Informal Mentoring Toolkit for Managers and Supervisors,

Continued

Informal presentations at employee meetings

There are many creative ways to support the Informal Mentoring: *Share What You Know* Initiative by building on activities that already exist. Managers can use 10 to 20 minutes of regularly scheduled unit meetings for informal knowledge sharing. These informal presentations provide an opportunity to learn more about other Divisions or business areas, what they do and how they do it. This is also a great way to facilitate networking connections for employees.

As a manager/supervisor, you are encouraged to:

- Send an email to employees asking which Division or area they would like to learn more about
 - If you do not get a response, create a list of Divisions or areas your employees may benefit from learning from. Think about people you often come in contact with, focus on improving efficiencies and understanding processes
- Create a template email to managers of the units you have selected to reach out to. In this email request include the following:
 - Provide your objective and aim in supporting Informal Mentoring initiative
 - Ask if they would be will to do a brief presentation for your employees about their unit and what they do
 - In order to help gain buy-in, emphasize that there are no expectations, and they can present informally on anything they want
 - Give four or five dates to choose from and let them know they can send whoever they would like to present, it doesn't necessarily have to be the manager/supervisor. The more flexible you can be the better
 - Prior to the presentation, check with the presenter(s) to be sure that your employees can follow up with any questions and get the point person's contact information
- When the speaker arrives, introduce them, thank them for coming and restate the purpose for the presentation
- At the conclusion of the presentation, provide the point person's contact information so that employees can reach out to them with more questions or for more information

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Informal Mentoring Toolkit for Managers and Supervisors, Continued

Share what you learned

The Informal Mentoring: *Share What You Know* project team in HRSD has endeavored to put together a useful toolkit for the manager/supervisor that is both effective and easy to use. Please let the team know what you found useful about this toolkit or what additional support you need by emailing us at Career_Services@CalPERS.CA.GOV.

Success stories play a major role to reinforce the concept that informal mentoring is an easy and worthwhile part of the CalPERS culture. Please share what you've learned with us so that we may leverage it to support this initiative.

Resources

Introduction

There are many resources available to all staff at CalPERS that support the Informal Mentoring: *Share What You Know* Initiative. Managers and supervisors are encouraged to take advantage of the following resources.

Learning Center

The Learning Center is located at Lincoln Plaza North (LPN) room 3285

- The Learning Center page on Inside CalPERS at <http://intranet.calpers.ca.gov/HRSD/Pages/Learning-Center.aspx> has a robust search function that allows the user to search by title, author or subject.
 - For resources related to Informal Mentoring, applicable searches include, but are not limited to:
 - Mentoring
 - Coaching
 - Icebreakers
 - Teambuilding
 - Motivation
 - Sample resources for icebreakers and teambuilding include:
 - *201 Icebreakers: Group Mixers, Warm-ups, Energizers, and Playful Activities* by Edie West
 - *The Big Book of Team Building Games* by John Newstrom & Edward Scannell
 - *25 Problem-solving & Decision Making Activities* by Dave Francis and Mike Woodcock
 - *Thiagi's 100 Favorite Games* by Sivasailam Thiagarajan
 - Sample resources for coaching and mentoring include:
 - *Coaching Basics* by Lisa Haneberg
 - *Coaching, Counseling, & Mentoring* by Florence Stone
 - *Masterful Coaching* by Robert Hargrove
 - *Coaching & Mentoring* by Harvard Business School Press
 - Sample resources for motivation include:
 - *Make the Right Choice: Creating a Positive, Innovative and Productive Work Life* by Joel Zeff
 - *How Full Is Your Bucket?* by Tom Rath and Donald O. Clifton
 - *1001 Ways to Energize Employees* by Bob Nelson
 - Learning Center staff is also available via phone at 3-2576 or HRSD_Learning_Center@CalPERS.CA.GOV for support and assistance with resource selection and availability.
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Resources, Continued

Career Services Program

The Career Services Program (CSP) in HRSD:

- The CSP provides information and tools to assist CalPERS staff in meeting their personal career goals.
 - Career Analysts are available for support regarding Informal Mentoring efforts by emailing Career_Services@CalPERS.CA.GOV.
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Informal Mentoring

The Informal Mentoring: *Share What You Know* webpages on Inside CalPERS:

- General information about the Informal Mentoring Initiative
 - <http://intranet.calpers.ca.gov/HRSD/Pages/Informal-Mentoring.aspx>
 - Informal Mentoring Resources
 - <http://intranet.calpers.ca.gov/HRSD/Pages/Informal-Mentoring-Resources.aspx>
 - Video of the Informal Mentoring Kick-off featuring speaker and author Joel Zeff
 - <http://insider.calpers.ca.gov/apps/vid-center/screen.asp?movieID=101>
 - Encourage staff new to your area to watch the video in its entirety (approximately 90 minutes)
 - Host a “movie afternoon” for staff to watch the video
 - Select one of Joel’s “games” and the corresponding commentary (approx. 15-20 minutes) to view and discuss during a staff or team meeting
 - For more information and support, please contact CSP staff at Career_Services@CalPERS.CA.GOV
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CalPERS Taboo Icebreaker Activity

Introduction

The CalPERS Taboo Activity is designed for use in a small group or team meeting (four or more people required) as an icebreaker activity. Below are the instructions and materials you will need to play CalPERS Taboo.

Items needed

- 4 or more players
 - Buzzer
 - Timer
 - CalPERS Taboo Activity Cards
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About CalPERS Taboo activity cards

A CalPERS Taboo starter kit is included with this toolkit on page 13. If you plan on using this activity with a larger group you may want to supplement and add more customized cards. Blank templates for additional cards are on pages 19 and 20 of this document. Consider developing cards for your own work unit or division, or units and divisions you work closely with. Developing customized cards is a great opportunity for team building. You are encouraged to swap any cards you develop specific to your area with another division or unit. If you choose to add customized cards and need additional assistance, trainers from All Staff Training and Development (ASTD) are available to support you.

NOTE: You can request assistance from ASTD via the [HRSD, Training Office Staff](#) mailbox; please allow ten business days.

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CalPERS Taboo Icebreaker Activity, Continued

Activity instructions

- Split the group into two teams, Team A and Team B.
- Team A chooses one of their players to be their first Clue-giver and that player sits holding the cards with the timer visible.
- Team B's players sit beside or behind Team A's Clue-giver so they can see the cards as the Clue-giver plays them. Team B controls the buzzer.
- The Clue-giver's teammates are not allowed to see the cards and they should sit opposite their Clue-giver, waiting to shout out the answer.
- Each Clue-giver has two minutes to get through as many cards as possible.
- After Team A's Clue giver has completed a turn, a member of Team B is chosen to be the next Clue-giver for their team. Seats are exchanged so that the new Clue-giver's teammates cannot see the cards and the opposing team can see the cards. The buzzer is passed to Team A.
- Teams take turns appointing Clue-givers and guessing words until all players have had one turn as Clue-giver.

NOTE: If one team has fewer players than others, one player from that team is the Clue-giver twice.

Rules for clues

- No form or part of ANY word printed on the card may be given as a clue. For example, if the Guess Word is Wellness, "well" cannot be given as a clue. Similarly, if CalPERS is the Guess Word, the Clue-giver can't use "Cal" or "PERS" as a clue.
 - No gesturers may be made. For example, the Clue-giver can't form his/her hands in the shape of an object or point at something to give a clue.
 - No sound effects or noises may be made.
 - The Clue-giver is not permitted to say the Guess Word "sounds like" or "rhymes with" another word.
 - No initials or abbreviations can be given if the words they represent are included on the card. For example, SSA or AGPA cannot be used if Analyst is the Guess Word.
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CalPERS Taboo Starter Kit Activity Cards

Management
Executive
Boss
Promote
Middle
Supervisor

Analyst
Associate (AGPA)
Staff (SSA)
Services
Analysis
Classification

Pension
Retire
Check
Benefit
Calculation
CalPERS

CalSTRS
Agency
Sister
Teacher
Pension
System

Anne Stausboll
Chief
Executive
CEO
Boss
Top

Twitter
Facebook
Social Media
Tweet
Bird
Communicate

CalPERS Taboo Starter Kit Activity Cards

Lincoln Plaza
Building
Direction
Headquarters
Compass
President

Golden 1
ATM
Credit Union
Check
Deposit
Money

OFAS Office of Audit Services
Money
Review
Compliance
Policy
Law

Informal Mentoring
Initiative
Meeting
Coffee
Promote
Advice

Wellness
Health
Fitness
Gym
Walk
Bike

Chili Cook-Off
Competition
Halloween
Beans
Annual
Eat

CalPERS Taboo Starter Kit Activity Cards

Core Values
Quality
Respect
Accountability
Integrity
Openness

Café
North
Grill
Salad
Caesar
Coffee

CASD Customer Account Services
Retirement
Health
Division
Supplemental
Judge

ESPD Enterprise Strategy & Performance
Strategic
Business
Plan
Governance
Performance

CalPERS Committees
Disability
Advisory
Diversity
PERSuaders
Health

HRSD Human Resources Division
Personnel
Employee
Selection
Workforce
Education

CalPERS Taboo Starter Kit Activity Cards

Employee Benefits	Inside CalPERS	Desktop Training
Vacation	Home	Excel
Medical	News	SnagIt
Vision	Policies	Outlook
State Holiday	Intranet	PowerPoint
Dental	Organization	Word
Mentor	PAOF <i>Office Of Public Affairs</i>	ACTO <i>Actuarial Office</i>
Meeting	Communication	Calculate
Share	Visual	Contribution
Suggest	Audio	Rate
Invite	External	Valuation
Speaker	Design	Financial

CalPERS Taboo Starter Kit Activity Cards

APSD Affiliate Program Services Division
Retiree
Benefit
CERBT
Administrator
Social Security

BNSD Benefit Services Division
Members
Beneficiaries
Retirement
Adjustments
Payment

Board Of Administration
Feckner
Auditorium
Member
Elected
Meeting

CDOP CalPERS Diversity Outreach Program
Differences
Strengths
Inclusion
Culture
Organization

CFI Center For Innovation
Testing
New
Assessing
Improvement
Pilot

CSOD Customer Service & Outreach Division
Regional
Employer
Member
Education
Communication

CalPERS Taboo Starter Kit Activity Cards

RRPD Retirement Research & Planning Division
Legislative
Employer
Direction
Program
Analysis

ECOM Enterprise Compliance Division
Ethics
Standards
Risk
Oversight
Mandatory

ERMD Enterprise Risk Management Division
Management
Emergency
Assessment
Monitor
Mitigation

EXEO Executive Office
Top
CEO
Decision
Leadership
Organization

FCSD Fiscal Services Division
Accounting
Money
Service
Financial
Travel / TEC

GOVA Office Of Governmental Affairs
Stakeholders
Policy
Federal
Legislation
Law

CalPERS Taboo Starter Kit Activity Cards

HPAD Health Plan Administration Division
Benefit
Program
Cost
Monitor
Policies

HPRD Health Policy Research Division
Employer
Regulation
Member
Guidance
Industry

STRL Stakeholder Relations
Event
Ice Cream
Forum
External
Organization

OSSD Operations Support Services Division
Building
Lincoln Plaza
Colliers
Office
Parking

LEGO Legal Office
Lawyer
Counsel
Contract
Court
Advice

PASD Policy and Administration Services Division
Legislative
Health
Retirement
Contracts
Coordination

CalPERS Taboo Starter Kit Activity Cards

ICOR Investment Compliance & Operational Risk Division
Policies
Regulations
Laws
Monitoring
Coordination

PBSD Investment Policy & Business Services Division
Core
Finance
Delegations
Communications
Planning

ISD Investment Servicing Division
Operations
Monitor
Portfolio
Analytics
Performance

ARS Absolute Return Strategies
Investment
Portfolio
Trade
Traditional
Management

AARM Asset Allocation & Risk Management
Board
Develop
Monitor
Policy
Mitigate

GE Global Equity
Internal
Portfolio
Strategy
Allocation
Monitoring

CalPERS Taboo Starter Kit Activity Cards

GFI Global Fixed Income
Affiliated
Funds
Compensation
Portfolio
Program

GG Global Governance
Investors
Corporate
Management
Financial
Performance

PE Private Equity
Capital
Partnerships
Fund
Investment
Venture

RA Real Assets
Program
Estate
Infrastructure
Portfolio
Return

BAIS Business Application Infrastructure Services
Systems
Integration
Server
Database
Environment

CTSD Customer Technology & Support Divisions
Service
Desktop
Production
Operation
Configuration

CalPERS Taboo Starter Kit Activity Cards

DCMD Data Center Management Division
Systems
Network
Server
Security
Infrastructure

ESDD Enterprise Solutions Development Division
Application
Engineering
Integration
Services
Analysis

IPAD IT Performance & Accountability Division
Administrative
Service
Quality
Test
Disaster

TISS Technology Innovation & Strategic Services Division
Portfolio
Research
Architecture
Analysis
Information

CalPERS Taboo Starter Kit Activity Cards

