

VOLUNTEER MENTORS FOR TRAINING – A GUIDE

Experience has shown that the use of mentors to support the training of volunteers enhances the learning by the volunteers and the likelihood of retaining volunteers in the Tax-Aide program. This has been shown also to be an effective use of experienced counselors who have the necessary skills and are committed to supporting your training efforts.

This guide is not intended to prescribe how or whether mentors are used in training. Rather, it is intended to give guidance should you use mentors in the training of volunteers. The following content is based on the experiences of training programs which have implemented a mentorship program – the successes they have achieved and what they have learned from their ‘not so successful’ efforts.

When considering the use of mentors, the immediate questions that come to mind are:

1. Why would a training program use mentors?
2. Who would make a good candidate as a mentor?
3. What are the responsibilities of a mentor?
4. Do’s and Don’ts as a mentor
5. Getting started with mentors

1. Why use mentors?

- a. They serve an important function by providing a first impression of the program for new volunteers;
- b. Mentorship could lead to being a future instructor;
- c. They gain additional knowledge and skills as tax counselors; and
- d. Mentors enhance instruction by providing student support and assistance; assistance which would otherwise fall on the instructor.

2. Who would make a good candidate?

- a. An experienced (Master level) counselor who has taken the initiative to acquire the necessary skills and knowledge to be an effective counselor;
- b. Someone who is willing to dedicate their time and skills to be a potential leader;
- c. A counselor who has demonstrated patience and good ‘people’ skills.

3. What are the responsibilities of a mentor?

- a. To provide assistance to individual volunteers. This can be done in several ways:
 - i. Mentors can be assigned to sit next to a student who is struggling;
 - ii. At the direction of an instructor, a mentor would assist a student with a question and then move back to their seat. A word of caution: no

VOLUNTEER MENTORS FOR TRAINING – A GUIDE

more than one mentor should be called upon to assist the student – no doubling up;

- iii. Mentors may simply observe from the back of the class and move to a student who appears to be having a problem;
 - iv. Mentors may be assigned to specific student(s) – this works well with a small number of volunteers;
 - v. Or, a combination of some or all of the above. There are many variables to consider; 1) the size of the class (number of volunteers), 2) the number of mentors available and 3) the determination of what their responsibilities are.
 - vi. Mentors may be assigned, as well, to certain student(s) as a resource outside the classroom.
- b. To assist the instructor with classroom setup and clean up at the end of the day;
 - c. To record their observations of volunteers' performance and questions asked during class. Also, mentors can be a good source of feedback to the instructor(s).

4. The Dos and Do Nots for Mentors;

- a. Be positive, respectful and encouraging!
- b. Be cognizant of what the instructor is doing at all times! Example: 1) if the instructor asks for the group's attention, mentors must stop what they are doing immediately thereby providing a good example to the class; 2) if the instructor moves on to the next objective and a mentor is working with a student but the student is still having problems, the mentor should stop and either get the attention of the instructor by raising their index finger or, if possible, have the student move on to the new objective promising to come back to the issue later with them.
- c. Use a soft voice when assisting a student. Voices can be distracting and usually louder than one thinks. This is a topic that should be included and practiced in the training for mentors.
- d. Write a note if something may have been missed by the instructor and wait until the end of the presentation/discussion. If the point isn't included, give the note to the instructor. Do not highlight the point out loud to the whole class.
- e. No hands-on of the student's laptop. The mentor is there to assist not to do the work for them. As well, mentors should avoid giving the student step-by-step instructions in solving the problem. The student should be helped to determine the proper resource (e.g., Publication 4012) and to use the information to find their answer. If the student is still confused, then specific information can be given but only a bit at a time. The key is for the student to figure it out as much as possible.

VOLUNTEER MENTORS FOR TRAINING – A GUIDE

- f. Never ask a question of the instructor or for the instructor that is of personal interest. In other words, a mentor is not to disrupt the instructor's flow by asking a question that is not being covered by the lesson or by injecting their own comment about a topic being discussed. If it is important, make a note for the instructor.
 - g. Never provide assistance if you don't know the answer; get someone who does know. This exemplifies the practice of asking for help and that it is a good thing.
 - h. Recommendation: mentors should not have their own laptops out or on. These simply distract them from fulfilling their responsibilities as a mentor.
 - i. Never, never carry on a conversation with fellow mentors (or anyone else) while the instructor is teaching!
- 5. Getting started with mentors.**
- a. First, training for mentors is strongly encouraged. They need to understand their role and their responsibilities. They need to know what they should not do as well. For those who have enlisted mentors in their training, experience has shown that this training is important if the mentorship program is to be successful.
 - b. The question of WHEN and HOW much time to devote to their training is best answered by the district's instructional team as they prepare their training plan for the tax season. Recommendation is to do it just before the training of new volunteers starts. The closer it is to this time, the better.
 - c. The Training Coordinator or Lead Instructor should provide these guidelines to experienced counselors who are candidates to be mentors and verify they are willing and able to fill the role.
 - d. The agenda for their training should include:
 - i. An outline of their role and responsibilities followed by role playing and discussion. This is a good time to tell them how important their participation is – **Thank you for volunteering for this!** Emphasize that 'we are a team' and our primary objective is to graduate the new volunteers as certified tax counselors.
 - ii. Presenting to them a list of Dos and Don'ts – discuss this list with them and conduct some role playing to demonstrate 'use of quiet voice'; how to properly assist a student; why it is important not to interrupt the instructor, the importance of focusing on the instructor and the lesson, the importance of note taking etc.
 - e. If mentors are assigned to individual volunteers, another suggestion is to make these assignments prior to the start of training and encourage mentors to contact 'their' volunteers before classes start to answer questions and establish a connection.