



Name: _____

Date: _____

Days & times of availability: _____

Phone Number and email to share with client: _____

PLEASE NOTE: Clients are typically referred by outside social workers and come to Britepaths in varying levels of financial stress. While we interview them to determine their motivation and commitment, it is unrealistic to expect every client to be "ready" to make significant changes all at once. Additionally, it may take some time for the right match to be found for you. We appreciate your patience. While you are waiting for a client, plan to attend Mentoring Roundtables to learn from others. Your engagement will be noted and increase the likelihood that a match can be found for you.

Questions:

1. Tell me about your past and/or current volunteer experience(s), and what you liked and/or didn't like about them.

2. What languages do you speak fluently?

3. How comfortable are you with the idea of "pushing" a client to be accountable, e.g. "tough love"? Please elaborate.



4. Is there a group of people that you would prefer to work with? For example would you be more comfortable with a single parent, an elderly person, a married couple?

5. Is there a group of people you feel you would NOT be a good match for? [If female] For example, would you be more comfortable with another woman? Would you be uncomfortable with an elderly person?

6. What skills do you have to offer that might be helpful as a Mentor?

7. What is it about Mentoring that is especially interesting to you?

8. Have you ever worked with a family in a stressful situation?

9. How would you generally describe yourself to someone who did not know you?



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Financial Mentor Questionnaire

10. What is your past experience working with members of diverse ethnic groups?

11. How would you feel about working with someone whose values are different from your own?

12. Please explain any personal experiences you've had in your own life where you struggled with finances or "learned the hard way".

13. Do you think everyone can be helped by financial mentoring?

14. Is there anything else you would like to share that would help us to get to know you better? This will enable us to better match you with a client when the time comes.



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Financial Mentor Questionnaire

Once you commit to working with a client in Britepaths' Financial Mentoring program, you will be required to provide a monthly mentor report electronically at the end of every month, detailing dates and time spent working with your client and any additional time you volunteered doing research on behalf of your client. In that report, you will also need to summarize the status of the clients' budget development and financial goal(s) and action plan(s) progress. You are also expected to actively participate in Mentoring Roundtables, and be involved with other mentors, sharing ideas and knowledge.

I understand and accept this commitment and will provide the monthly report promptly (please circle):

Yes

No

Signature

Date