



Volunteer Roles

Data Entry

This position will work with the Business Education Team at WWBIC to assist in data entry, as well as following up with clients via phone and email for our Wisconsin Saves & Outreach Programs. Basic computer experience is a must as well as experience in Excel & Microsoft Office.

Expert Auditor

The Wisconsin Women's Business Initiative Corporation is seeking people who have experience in marketing, cash flow, customer service and education to audit small business and financial awareness classes. Qualified candidates will be asked to assess the curriculum as well as the instructor's presentation and knowledge of the subject being taught. Evaluation forms as well as a stamped envelope will be provided. Expert Auditors will be asked to mail back the completed evaluations forms within five business days.

Expert Business Presenters:

Expert Business Presenters volunteer their time to teach a class of entrepreneurs and or small business owners on an area of expertise. Topics include but are not limited to; marketing, cash flow, financial awareness, internet marketing etc. Curriculum is provided for all classes. Most classes take place in the evening and run for three hours.

Guest Speakers:

Guest Speakers volunteer their time to speak to a class of entrepreneurs and start up business owners on their area of expertise, or the business topic of their choosing and are needed to provide real world expertise to the entrepreneurs. Guest Speakers are looked upon as a resource for our entrepreneurs. All presentations occur within an already established class, taught by a trained and certified facilitator and supplement a formal curriculum. Presentations typically last up to 30 minutes followed with time for questions and answers. Guest Speakers are called upon two to six times a year. Guest Speakers are not to promote or directly sell their service(s) or product(s) to WWBIC clients during the session. If a client would like to receive information from you they would be free to do so on their own time and outside of WWBIC classes.

Consultants:

Consultants help entrepreneurs grow their business through advising relationships with experienced business professionals. Leverage your volunteer and pro-bono work to directly impact the lives of emerging entrepreneurs, their families and their communities while supporting sustainable, community-based economic development. Consultants make a huge difference in the lives of WWBIC's entrepreneurs by helping them navigate the opportunities and challenges of running a business and improving their economic well-being and creating new jobs where they are needed.

Coaches:

For over a decade the Wisconsin Women's Business Initiative Corporation (WWBIC) has taken an active role in coaching WWBIC's small business owners, particularly those owned by women, people of color, and low income individuals. WWBIC uses coaching to meet the needs of our emerging businesses by providing expertise of its coaches and access to business networks. The coach is asked to work one on one with the client and provide expertise in their area of choosing. The time commitment in this position varies on the client's need.

The Anything & Everything Volunteer:

This volunteer position is geared at anyone and everyone who wants to make a difference in the world. Non-Profits could not run effectively without dedicated volunteers. So if stuffing envelopes and dropping off schedules is something you are interested in doing this position is for you.

The Business Plan Reviewer

WWBIC offers classes that teach our student's how to write their own business plan. Once their business plan is complete it is reviewed by a Business Plan Reviewer. This person will give their expert evaluation of a business plan's completeness, credibility, detail and potential success. A WWBIC business plan criteria sheet will be provided.

Contact Manager

WWBIC is looking for a detail-oriented person to assist WWBIC loan client's in creating a database. Many of our clients are busy operating their business and as such, they do not have time to set up this valuable marketing tool. This volunteer will work with our clients to access their needs as well as create a database in Constant Contact as well as create a client list that can be used for direct mailings.

QuickBooks Coach

This volunteer position is geared towards people who are savvy in QuickBooks and like working with people on a one on one basis. Help get our small business owners on track by teaching them how to utilize this software to track their accounts payable, accounts receivable, payroll, sales and use tax.

Website Designer

This position is for people who are interested in volunteering their time to create websites for our small business clients throughout the state. Candidates for this position must have prior experience to website design and be willing to share past work. Request may include ecommerce and flash pages. Time commitment varies per client but is very flexible. Most of the work can be done via email and phone conferencing.

Graphic Designer

This position is seeking a volunteer that is creative and able to think outside the box. Graphic design software is required to create marketing materials for WWBIC's small business owners. This role will aid in the development of logos, brochures, business cards, layouts for mass e-mail lists and other print media.



Volunteer Application

Name _____

Address _____ City/State _____

Zip _____ Phone (Day) _____ (Eve) _____

E-Mail _____ In-Kind Donation _____

Emergency Contact _____ Phone _____

Do you have any limitations that will restrict your volunteering? _____ Please explain _____

Have you ever been convicted of a crime? _____ Please explain: _____

How were you referred to us? _____

Why do you want to volunteer here? _____

What skills or talents would you like to use? _____

What do you want to gain from your volunteer experience? _____

Current Employer

Company _____ Address _____

Position _____ Length of Employment _____

Current or Past Volunteer Experiences

Agency _____ Address _____

Position _____ Phone _____ Dates _____

Agency _____ Address _____

Position _____ Phone _____ Dates _____

The above information is correct and complete to the best of my knowledge, without consequential omissions of any kind. I authorize the organizations and persons named to release any information requested regarding my service, character and qualifications. I understand that the agency may do a background check. I acknowledge that by completing this application the agency is not obligated to offer me a volunteer position.

Signature _____ Date _____

For office use

Date Started _____ Position _____

Schedule _____

_____ Interview

_____ Vol/Agency Agreement

_____ Job Description

Thank you for your interest in volunteering!



Volunteer & Agency Agreement

Any relationship is enhanced by good communication. This agreement outlines the expectations of the volunteer and the Wisconsin Women's Business Initiative (WWBIC) so the volunteer can be most successful in meeting their own personal needs while fulfilling the WWBIC mission.

The Agency Agrees to:

1. Provide adequate information, training and assistance for each volunteer to be effective.
2. Willingly receive the volunteers' comments and suggestions.
3. Treat each volunteer as a member of our team.
4. Provide feedback on volunteer performance and appreciation for their work.
5. Respect the skills, dignity and individual needs of each volunteer.

The Volunteer Agrees to:

1. Act as a member of the team at all times to accomplish the mission of WWBIC.
2. Be punctual and conscientious in fulfilling my duties.
3. Adhere to my schedule and promptly report any absence.
4. Perform my volunteer duties to the best of my ability and conduct myself with honesty, dignity and courtesy.
5. Take any problems, concerns or suggestions to the Volunteer Coordinator.
6. Follow all rules and accept supervision with a willingness to learn, and ask about things not understood.
7. Adhere to the drug-free workplace policy. Volunteers must not use or be under the influence of controlled substances while volunteering.
8. Use office equipment (computers, phones, etc.) and supplies for agency business only, unless given specific permission.
9. Notify the Volunteer Manager when I am no longer able to volunteer, or if my work will be interrupted for an extended period of time.

The Client Agrees to:

1. Willingly receive volunteer comments and suggestions.
2. Provide feedback in regards to working with a volunteer.
3. Understands working with a volunteer through WWBIC does not constitute an endorsement for purchase of goods or services, or entering into a business relationship with the volunteer.
4. Accepting private business consultation from a volunteer is a decision that is to be made solely by the client and not by WWBIC.

Wisconsin Women's Business Initiative Corporation's Conflict of Interest & Confidentiality Agreement

- I shall hold the affairs of all persons seeking WWBIC services in strict confidence and maintain the high standards of professional conduct. I agree not to divulge to unauthorized persons any confidential information obtained from observation, conversation, correspondence, personal records or any other source. This includes information about both the staff and people served by our agency. I will not publish, orally disclose or otherwise make public any confidential information, except as I am legally required.
- I shall not recommend the purchase of goods or services from sources in which I have a direct or indirect financial interest.
- I shall not provide equity or debt financing, directly or indirectly, or obtain an interest in the business of any WWBIC client through a joint venture, partnership, or other form of business combination.
- I shall not solicit or accept private business consulting/counseling engagements for myself, my family, or any member of an organization in which I have a significant financial interest, from any persons seeking counseling/technical assistance from WWBIC during my term of service/employment with WWBIC.
- Disregard of any of the above may lead to immediate removal from WWBIC and other remedies as appropriate, including dismissal.

(Signatures will appear as follows :)

I have read and understand the foregoing Conflict of Interest Policy. I agree to its terms, and my actions have been and will continue to be guided thereby.

Name of person and role (print)

Signature of person

Date

Acknowledged on behalf of WWBIC:

Signature of WWBIC representative

Date

Signature of Client

Date

11. How did you hear about our program? (please check one)

- | | | | |
|--|---|---|---|
| 2 <input type="checkbox"/> Bank/Credit Union | 14 <input type="checkbox"/> WWBIC Website | 9 <input type="checkbox"/> SBA | 13 <input type="checkbox"/> Government Office |
| 3 <input type="checkbox"/> Newspaper/Magazine | 5 <input type="checkbox"/> Other Websites | 1 <input type="checkbox"/> Word of Mouth | 10 <input type="checkbox"/> WWBIC Direct Mail |
| 4 <input type="checkbox"/> Chamber of Commerce | 6 <input type="checkbox"/> Radio/Television | 12 <input type="checkbox"/> Expo/Trade Show | 11 <input type="checkbox"/> Other _____ |

12. Which of the following most closely resembles your current self-employment situation? (please check one)

- 1 Thinking about starting a business
2 Am in process of starting a business but have made no sales
3 Have opened a business and made sales within the last 12 months
4 Have been in business with sales for more than 12 months

13. How many adults and children are in your household? _____ Adults _____ Children

14. Did you receive any of the following assistance? (please check all that apply)

- | | | |
|---------------------------------------|--|--------------------------------|
| <input type="checkbox"/> W2/TANF | <input type="checkbox"/> Rent Assistance | <input type="checkbox"/> SSDI |
| <input type="checkbox"/> Unemployment | <input type="checkbox"/> Medicare | <input type="checkbox"/> Other |
| <input type="checkbox"/> SSI | <input type="checkbox"/> Food Stamps | |

15. Is it important to you that this program targets women? (please check one) Yes No

16. What was your gross (before taxes) household (not individual) income last year that supported all members of the household? (please check one) (Required)

- | | | | |
|--|--|---|--|
| 1 <input type="checkbox"/> Under \$10,000 | 5 <input type="checkbox"/> \$25,000-29,999 | 9 <input type="checkbox"/> \$50,000-59,999 | 13 <input type="checkbox"/> \$90,000-99,999 |
| 2 <input type="checkbox"/> \$10,000-14,999 | 6 <input type="checkbox"/> \$30,000-34,999 | 10 <input type="checkbox"/> \$60,000-69,999 | 14 <input type="checkbox"/> \$100,000-199,999 |
| 3 <input type="checkbox"/> \$15,000-19,999 | 7 <input type="checkbox"/> \$35,000-39,999 | 11 <input type="checkbox"/> \$70,000-79,999 | 15 <input type="checkbox"/> \$200,000 and Over |
| 4 <input type="checkbox"/> \$20,000-24,999 | 8 <input type="checkbox"/> \$40,000-49,999 | 12 <input type="checkbox"/> \$80,000-89,999 | |

17. Is there someone else in your household earning income (for example spouse, partner, adult children, relative)? (please check one) Yes No

18. As a WWBIC client, you will automatically receive immediate access to Wisconsin Saves. At no cost, you will receive newsletters and opportunities to participate in informational workshops to help you attain financial goals such as savings, college planning, and debt reduction. No, I do not wish to receive the listed benefits.

Request for Assistance and Certification

I request business management counseling and/or training from The Wisconsin Women's Business Initiative Corporation (WWBIC) which is funded partly by the US Small Business Administration. I agree to cooperate should I be selected to participate in surveys designed to evaluate SBA-funded services. I understand that any information received by WWBIC will be held in confidence to the extent permitted by law. I further understand that the counselor or trainer in this program has agreed 1) not to recommend goods or services in which he/she has an interest and 2) not to accept fees or commissions developing from this counseling relationship. In consideration of SBA's funding of WWBIC and the assistance to be furnished, I agree to waive all claims arising out of this assistance against SBA personnel, WWBIC, its host organization, and the resource counselor(s) who assisted me.

I formally authorize WWBIC to use my name and image for promotional activities sponsored by WWBIC.

I certify that all my statements on this form are correct to the best of my knowledge and that I will cooperate in providing follow-up information needed to evaluate the effectiveness of the program if asked by an authorized representative of WWBIC.

Signature: _____ Date: _____