*Thank you for your interest in WWBIC! Please fill out information completely, sign, and   
e-mail with a resume to* [*Cassandra.plaster@wwbic.com*](mailto:Cassandra.plaster@wwbic.com) *or fax to 414-263-5456*

Office Use Only

Interview Date DB

OT

**Applicant Information**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Name |  | | | | | | | Date |  |
| Address | |  | | | | | | | |
| City, State, Zip | | | |  | | | | | |
| Preferred Phone | | | |  | Email Address | |  | | |
| Other Phone | | |  | | | Birthdate | / / | | |

**Emergency Contact**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name |  | | Relationship |  |
| Cell Phone | |  |  |  |

**Reason for Volunteering** (Check all that apply)

|  |  |  |
| --- | --- | --- |
| Personal Enrichment | Improve skills | Work/School Requirement |
| Increased Portfolio | Networking | Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**Opportunities** (Check all that interest you)

|  |  |  |
| --- | --- | --- |
| One-on-One Work with Clients | Business Plan Reviewing | Advisory Committee |
| Group Facilitation | Office/Administrative | Loan Committee |
| Guest Speaking | Internship | Finance Committee  Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**Skills**

**Financial**

|  |  |  |
| --- | --- | --- |
| QuickBooks Certified | Profit and Loss Statements | Business Tax Reporting |
| Accounting | Investments | Cash Flow Projections & Management |
| Lending | Banking |

**Legal**

|  |  |  |
| --- | --- | --- |
| Business Entities | Intellectual Property | Food/Bar Licensing |
| Leases and Contracts | Real Estate Transactions | Employment Law |
| Will/Estate Planning | Succession planning | Tax Law |

**Marketing**

|  |  |  |
| --- | --- | --- |
| Marketing Strategic Plans | Graphic Design/Logos | Web Design/Social Media |
| Photography/Video | Written Copy | Branding |

**Other**

|  |  |  |
| --- | --- | --- |
| Technical/IT | Strategic Planning | Insurance |
| Real Estate | Coaching | Government |
| Entrepreneurship | Human Resources |  |

**Languages Spoken**

|  |  |  |  |
| --- | --- | --- | --- |
| Spanish | | Hmong | Arabic |
| Other: |  | | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Current or Most Recent Employer** | |  | | | |
| Position |  | | | Dates Worked |  |
| Duties | | | | | |
| **Most Recent Volunteer Organization** | | |  | | |
| Position |  | | | Dates Worked |  |
| Duties | | | | | |
| **Please include a short bio** | | |  | | |
|  | | | | | |

**Do you have any limitations that will restrict your volunteering?** Yes No

If Yes, please explain:

|  |
| --- |
|  |

**Have you ever been convicted of a crime?** Yes No

If Yes, please explain

|  |
| --- |
|  |

**Voluntary Demographic Information**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| *The following information is completely voluntary, and is used for funding reporting purposes only:* | | | | | |
| **What is your race?** | | I do not wish to respond | | | |
| African American/Black | White/Caucasian | | American Indian/Alaskan Native | | |
| Asian | Native Hawaiian/Pacific Islander | | | Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |
|  | | | | | |
| **What is your ethnicity?** | | I do not wish to respond | | | |
| Hispanic/Latino | Non-Hispanic/Latino | | | |  |
|  | | | | | |
| **What is your gender?** | | I do not wish to respond | | | |
| Female | Male | | Transgender | |  |
|  | | | | | |
| **What is your current military status?** | | I do not wish to respond | | | |
| Veteran | National Guard/Reserve | | Non-Veteran | | |
| Active Duty | Service-Disabled Veteran | |  | | |

**Volunteer Agreement and Expectations**

This agreement outlines the expectations of the volunteer and the Wisconsin Women’s Business Initiative Corporation (“WWBIC”) for the undersigned (the Volunteer”) and the duties of the Volunteer while performing volunteer services for the undersigned WWBIC client (the “Client”).

I, as a WWBIC volunteer, understand that I will undertake my volunteer services in support of WWBIC’s Mission Statement, which I understand is as follows:

WWBIC’s mission is to promote economic development through microenterprise by providing access to capital including direct lending, one-on-one individualized business assistance, business education, and asset building financial awareness education programming, with an emphasis on women, people of color, and people of lower wealth and income.

I agree to the following:

1. I will be punctual and conscientious in fulfilling my volunteer services.

2. I will adhere to my schedule and promptly report any absence.

3. I will perform my volunteer services to the best of my ability.

4. I will conduct myself with honesty, dignity and courtesy.

5. I will report any problems, concerns or suggestions to the Education Outreach & Volunteer Coordinator.

6. I will follow all rules and willingly accept supervision.

7. I will adhere to the drug-free workplace policy. I will not use or be under the influence of controlled substances while performing my volunteer services.

8. I will use office equipment (computers, phones, etc.) and supplies only to perform my volunteer services and not for personal purposes, unless I receive specific permission otherwise.

9. I will notify the Education Outreach & Volunteer Coordinator when I am no longer able to volunteer, or if my work will be interrupted for an extended period of time.

**Conflict of Interest & Confidentiality Agreement**

I agree to the following:

1. I shall hold the affairs of all persons seeking WWBIC services in strict confidence and maintain the highest 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 but is not limited to information about both the staff and people served by WWBIC. I will not publish, post online, orally disclose or otherwise make public any confidential information, except as I am legally required.

2. I shall not recommend the purchase of goods or services from sources in which I have a direct or indirect financial interest unless those financial interests are represented by my holdings of publicly traded stocks (i.e. banking institutions, insurance companies, manufacturers, retail stores, etc.).

3. 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 unless such involvement is reviewed and agreed to by WWBIC in advance. If I discover such involvement has occurred inadvertently via a passive investment or holding (i.e., an angel or venture capital fund, acquisition by existing company, etc.), I will immediately notify WWBIC for WWBIC to determine what if any agreed upon action is required.

4. I shall not actively solicit 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 volunteer service/employment with WWBIC. Exceptions are if such engagements are at the request of WWBIC or the client (without solicitation), in which case the services provided will be limited to the scope of work requested; if the engagement was prior to the client’s seeking WWBIC’s assistance; or if the assistance is provided at the request of another nonprofit or government agency. In all cases, I am responsible to keep WWBIC informed of any private consulting relationship with WWBIC clients, and such private consulting relationships are subject to WWBIC’s review and approval.

5. My disregard of any of the above obligations may lead to my immediate removal from WWBIC, and other remedies as appropriate, including dismissal.

**No Employment**. I agree and understand that my service as a WWBIC volunteer does not constitute an engagement of employment by WWBIC or by the Client. I agree and understand that I will not receive, either from WWBIC or from the Client, any compensation for my services as a WWBIC Volunteer, except in certain limited circumstances when WWBIC or the Client may separately agree to compensate me for specific services that I may provide to the Client on a consulting basis arranged through the WWBIC volunteer services program. In no circumstance, however, will the offer of such compensation by WWBIC or the Client, and my acceptance of such compensation, constitute an engagement of employment by WWBIC or the Client, and at all times during such limited circumstance I agree and acknowledge that I serve the Client as an independent contractor.

**Indemnification**. I agree that I am responsible for my behavior as a WWBIC volunteer, and I agree to indemnify and hold harmless WWBIC, any WWBIC client, their officers, directors, employees, agents, and other volunteers from any damages or liabilities arising out of my volunteer services through WWBIC. I hereby forever release WWBIC, any WWBIC client, their officers, directors, agents, employees, and other WWBIC volunteer from any and all claims, lawsuits, damages, or other losses arising out of or in any way related to my volunteer services that may be asserted by or on behalf of me.

I have read and understand the foregoing Volunteer Agreement and Expectations, and I agree to perform my volunteer services in compliance with its terms.

Further, I certify that 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 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.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of person and role (print)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature Date