



FY27 Small Business Technical Assistance Grant & Small Business Development Grant

Informational Webinar

08.03.26

Webinar Overview



This webinar will be recorded and made available on the Small Business Technical Assistance Grant program webpage



Please submit any questions you have in the “Q&A” box

Agenda

- Small Business Technical Assistance Grant
 - SBTA Program Overview
 - Application Process and Scoring
 - Important Dates
 - Q&A

- Small Business Development Grant
 - SBDG Program Overview
 - Application Process and Scoring
 - Important Dates and Considerations
 - Q&A



SBTA Program Overview

- The Small Business Technical Assistance (SBTA) Grant was created as part of a broader effort to reorganize WEDC's support for small business development in Wisconsin.
- The (SBTA) program provides grants to technical assistance providers, which can be used for their **project specific** operational costs for technical assistance to traditional small businesses. These funds support programming for all stages of a traditional small business's life cycle.

SBTA Program Overview

- The SBTA program is intended to increase traditional small business activities across Wisconsin. The program will strengthen the entrepreneurial ecosystem by utilizing community building, capacity building, technical assistance, and other similar support. Those served by the funded programs may be provided with a wide range of support, including experienced hands-on mentorship, educational programming, community building, leadership training, entrepreneurship and networking events, and business development strategies.
- The SBTA program provides grants to technical assistance providers, which can be used for their **project specific** operational costs for technical assistance to traditional small businesses. These funds support programming for all stages of a traditional small business's lifecycle.

SBTA Program Overview

- Competitive grant program, There will only be one round for FY27
- Applicants must be a non-profit entity
 - This includes municipalities and governments, Tribal entities, educational institutions, and community development organizations
 - Fiscal sponsorships are allowed
 - For-profit, businesses are not eligible to apply
- 1:1 Match required
 - Matching funds can be cash or in-kind
- Maximum award amount is \$200,000
- Eligible Project Costs include operational and consulting
- Programs should be approximately 12 months in duration
- Performance reports are due annually
 - A Schedule of Expenditures will be required for awards over \$100,000

SBTA By the Numbers

- 90 Applications Sent
- 65 Applications Submitted
- \$6.9M Requested
- 21 Grants Awarded
- \$2,123,900 Total Awarded
- [FY26 SBTA Awardees](#)



SBTA Ineligibility

➤ Pass through funding including but not limited to direct payments and stipends to businesses served by the grant.

➤ Related Party or Person transactions.

*A related Party or Person means a family member such as a brother, sister, parent, grandparent, child, grandchild, spouse, or in-laws, if that person has control, joint control, or significant influence over a corporation or entity or is a member of its key management personnel; or an entity related to the Recipient if, among other circumstances, it is a parent, subsidiary, fellow subsidiary, associate, or joint venture of the Recipient, or it is controlled, jointly controlled, or significantly influenced or managed by a person who is a related party or the Recipient itself.

➤ Small Business Development Centers (SBDCs) cannot receive SBTA funding.

Evaluation Criteria

Project Alignment and Feasibility:

- The extent to which the work plan is feasible including project range, duration, and impact.
- The extent to which the applicant and project collaborators may have relevant experience and historical performance in program administration including previous WEDC awards, if applicable.

Financial Viability:

- The extent to which matching resources are available and utilized within the project budget.
- The extent to which the project budget supports entrepreneurs compared to supporting operations as it relates to the overall intensity, duration, or rigor of the project
- The extent to which WEDC funds impact the applicants' ability to assist individuals and/or companies.

Outcome and Impact:

- The extent to which the applicant demonstrates and plans to track impact with measurable, feasible, and impactful project outcomes.
- The extent to which the applicant demonstrates a unique position to meet community need for the target population or location.

Innovation and Sustainability:

- The extent to which the program model can be replicated and/or sustained in other areas of Wisconsin.

Additional Considerations:

- Presence of partnering and collaborating organizations and extent of community support.
- Use of novel and innovative approach to supporting individuals and/or companies.
- Alignment to WEDC priorities for industry sectors, local economic factors, geography, and target populations.

Network Wisconsin



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Welcome Back to Network Wisconsin!

Here's What's Happening Today

Welcome back to your home dashboard! From here you can stay on top of your portal activities and tasks, and never miss an important deadline for your projects.

- **Tasks for Today:** You have 45 open tasks today. Looks like none of these tasks are overdue, so you're currently in good shape. To work tasks you are assigned, click the Review button for the task in your task list below.

If you need help or have questions, please click on the 'Ask for Help' button from any of your portal record pages, or visit the portal Help page for other general inquiries.

Thank you!
Your WEDC Team

Hide/Show Today's Summary

SBTA Application

- Legal Entity
- Chartering Document
- Application Information
- Organization Information
- Project Narratives
- Budget
- Information on Legal Proceedings
- State Request for Bid or Proposal

SBTA Application

* Legal Entity Type 

--none--



* W-9  [Download Blank W-9](#)

Upload a complete copy of the entity's W-9 signed and dated in the past 12 months.

[Choose File\(s\)](#)

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See <i>Specific Instructions</i> on page 3.	1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)	
	2 Business name/disregarded entity name, if different from above.	
	3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. ☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate ☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. ☐ Other (see instructions)	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) (Applies to accounts maintained outside the United States.)
3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions ☐		
5 Address (number, street, and apt. or suite no.). See instructions.	Requester's name and address (optional)	
6 City, state, and ZIP code		
7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
				-			-		
or									
Employer identification number									
				-					

Part II Certification

Under penalties of perjury, I certify that:

- 1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- 2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- 3. I am a U.S. citizen or other U.S. person (defined below); and
- 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person	Date

SBTA Application

Chartering Document

Upload a copy of the entity's chartering document (i.e., articles of incorporation/organization; governing statute; charter), if applicable.

Choose File(s)

SBTA Application

* Financial Statements



Provide the last 3 years of complete financial statements, which includes a profit and loss, balance sheet, and cash flow statement for each year, including interim financials, if applicable. If the organization has been in operation for less than three years, provide complete financial statements for as many years as it has been in operation including interim financials.

Choose File(s)

SBTA Application

Non-Profit Credentials Upload

Please identify and submit the non-profit credentials of the organization, such as a Non-profit IRS Determination Letter.

Choose File(s)

SBTA Application

* Project Description

Provide a summary statement of your project.

Additional details will be provided in subsequent questions. Max length: 4000 characters or about 2 paragraphs.

* Project Manager(s)

Please identify the project manager(s) and briefly describe their level of experience managing similar projects, or other relevant industry knowledge. Max length: 5000 characters or 2-3 paragraphs.

Project Curriculum or Technical Services Offered



Provide a detailed description of the programming, curriculum, or technical services being offered through the project. Max Length: 10,000 characters or 4-5 paragraphs.

Application

If applicable, provide a sample application or description of eligibility requirements for companies applying to the program.

[Choose File\(s\)](#)

SBTA Application

* Attestation for Eligibility

The Applicant certifies that neither its business operations nor the project or program for which assistance is sought uses any protected class as an eligibility criterion or factor in participation or evaluation. For purposes of this Certification, “protected class” includes classifications recognized under the Equal Protection Clause of the Fourteenth Amendment, including: race, color, ethnicity, national origin, ancestry, sex (including pregnancy), and legitimacy, and, where applicable, alienage, religion, and disability.

Check the box to agree.

☐

SBTA Application

* Budget ⓘ Download Budget

Download and complete your budget, then upload the document.

Choose File(s)

SBTA Application

- Expenses/Uses of Funding
- Sources and Amounts of Funding
 - WEDC Amount (Amount org is requesting from WEDC)
 - Match Source Name
 - Match Source Amount
 - Cash or In-kind Match
 - Total Budget

SBTA Application

SMALL BUSINESS TECHNICAL ASSISTANCE GRANT BUDGET						
EXPENSES/USES OF FUNDING	SOURCES AND AMOUNTS OF FUNDING (Match Source Amount must equal WEDC Amount in total, not within each expense line. If multiple funding sources for one expense, use multiple lines)					TOTAL
	WEDC Amount	Match Source Name	Match Source Amount	For Match, indicate cash or in-kind		
CONSULTING / THIRD-PARTY EXPENSES (any expenses paid to an external vendor directly related to the project)						
	\$ -		\$ -	☐ Cash	☐ In-kind	\$ -
	\$ -		\$ -	☐ Cash	☐ In-kind	\$ -
	\$ -		\$ -	☐ Cash	☐ In-kind	\$ -
	\$ -		\$ -	☐ Cash	☐ In-kind	\$ -
	\$ -		\$ -	☐ Cash	☐ In-kind	\$ -
OPERATIONAL AND STAFF TIME EXPENSES (list out type of internal expense that is directly related to the project and provision of technical assistance to businesses)						
	\$ -		\$ -	☐ Cash	☐ In-kind	\$ -
	\$ -		\$ -	☐ Cash	☐ In-kind	\$ -
	\$ -		\$ -	☐ Cash	☐ In-kind	\$ -
	\$ -		\$ -	☐ Cash	☐ In-kind	\$ -
	\$ -		\$ -	☐ Cash	☐ In-kind	\$ -
TOTAL	\$ -		\$ -	☐ Cash	☐ In-kind TOTAL	\$ -

SBTA Application

SMALL BUSINESS TECHNICAL ASSISTANCE GRANT BUDGET						
EXPENSES/USES OF FUNDING	SOURCES AND AMOUNTS OF FUNDING (Match Source Amount must equal WEDC Amount in total, not within each expense line. If multiple funding sources for one expense, use multiple lines)					TOTAL
	WEDC Amount	Match Source Name	Match Source Amount	For Match, indicate cash or in-kind		
CONSULTING / THIRD-PARTY EXPENSES (any expenses paid to an external vendor directly related to the project)						
Instructor Fees	\$ 20,000.00	ABC Foundation	\$ 20,000.00	☒ Cash	☐ In-kind	\$ 40,000.00
	\$ -		\$ -	☐ Cash	☐ In-kind	\$ -
	\$ -		\$ -	☐ Cash	☐ In-kind	\$ -
	\$ -		\$ -	☐ Cash	☐ In-kind	\$ -
	\$ -		\$ -	☐ Cash	☐ In-kind	\$ -
OPERATIONAL AND STAFF TIME EXPENSES (list out type of internal expense that is directly related to the project and provision of technical assistance to businesses)						
Staff time to provide TA	\$ 100,000.00	ABC Bank	\$ 100,000.00	☒ Cash	☐ In-kind	\$ 200,000.00
	\$ -		\$ -	☐ Cash	☐ In-kind	\$ -
	\$ -		\$ -	☐ Cash	☐ In-kind	\$ -
	\$ -		\$ -	☐ Cash	☐ In-kind	\$ -
	\$ -		\$ -	☐ Cash	☐ In-kind	\$ -
TOTAL	\$ 120,000.00		\$ 120,000.00	☐ Cash	☐ In-kind TOTAL	\$ 240,000.00

Enter any notes on budget here

SBTA Information

- [Small Business Technical Assistance Program](#)
- [Program Guidelines](#)
- [Program Information](#)
- [Program FAQs](#)

How to Apply

- To begin the application process, you must first email a WEDC Diverse Business Development team member:
- Nichole Crust, nichole.crust@wedc.org
- Seyoum Mengesha, seyoum.mengesha@wedc.org
- Francisca Rodriguez, francisca.rodriguez@wedc.org
 - Include:
 - Name of entity applying
 - Name/Email to receive application
- You will receive an online application through Network Wisconsin
- Complete and submit online application by Oct. 2 @ 5:00pm

Timeline

- Applications are open
- Office hours Aug. 19 and Sept 16 - 9:00am-4:00pm
- Applications due Oct. 2 @ 5:00pm
- Scoring period Oct. 12-26
- Awarded applications contracted by Feb/Mar
- Awarded applications publicly announced in 2027
 - *Must wait for WEDC to make announcement
 - **For those that need board approval/municipal resolution, may need to act ASAP for application deadline



Questions?

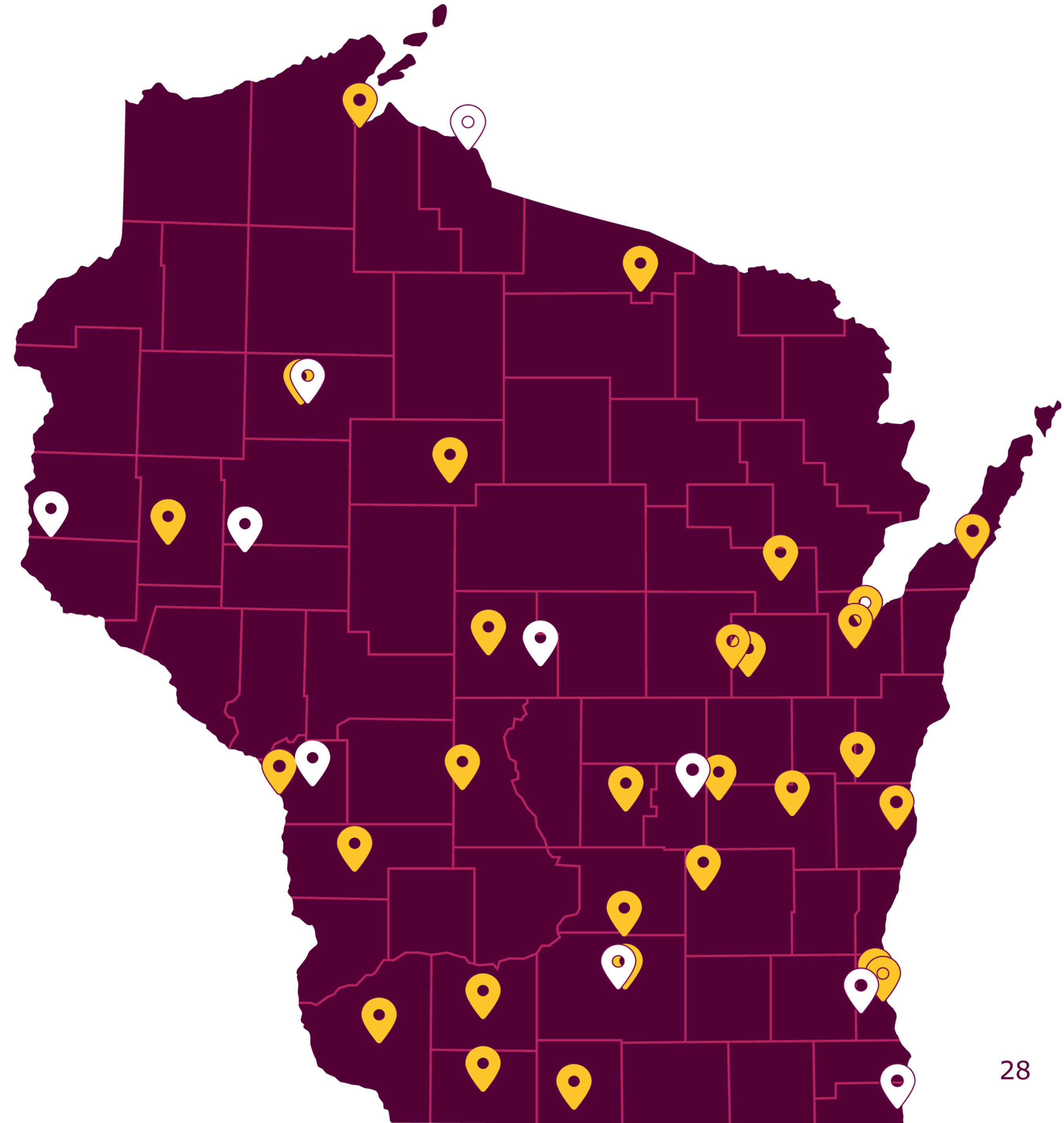
SBDG Overview

- Competitive grant program, available for one round in FY27
- Program Purpose
 - Increase access to capital to small businesses and spur small business creation
 - Encourage communities and economic development partners to invest in small businesses
 - Encourage program innovation and provide flexibility for programs to be tailored to community needs



Past SBDG Awards

- 39 Awards
- \$6,190,000
- Awards Based in 30 Counties
 - Even More Served!
- 19 Awards in Urban Counties
- 20 Awards in Rural Counties



About SBDG: Eligibility

- Eligible Applicants
 - Municipalities
 - Counties
 - Tribal governments
 - Economic development organizations
- Previous awardees may apply, **if all previous funds utilized**
- Must be in compliance on all existing WEDC awards



About SBDG: Use of Funds

- \$1.5 million for FY27
- Grants of \$50,000-\$250,000
- Eligible Use: Small business financing programs (e.g. grants or loans)
 - Must be for-profit
 - Must have less than 25 full-time employees
- Ineligible Use: Admin costs, reporting costs



Evaluation Criteria – See PGs for full list

Outcome and Impact:

- The extent to which the proposed effort provides a model to maintain grant funding for long-term use in the applicant's service territory. The extent to which the program as proposed will support local business growth. The extent to which the applicant's program provides customized business advising and technical assistance.
- The extent to which the applicant's program will address a local economic challenge (e.g. number of localities served, geography, businesses served, etc.). The extent to which the proposed effort can be replicated throughout Wisconsin.
- The extent to which the problem has been approached through collaboration with other economic development groups and other local jurisdictions. The extent to which the applicant demonstrates community demand/support/need for program. The extent to which the applicant demonstrates the critical need for WEDC financial support.
- The extent to which the project will provide an impact to economically distressed communities, rural areas, and/or historically underserved populations.

Budget:

- The extent to which the applicant budget is complete and displays how funds will support small businesses.
- The extent to which the applicant has a plan to disburse grant funds within the first 18 months of the project window.
- The extent to which the applicant has secured match funds (a match is not required).

Additional Considerations:

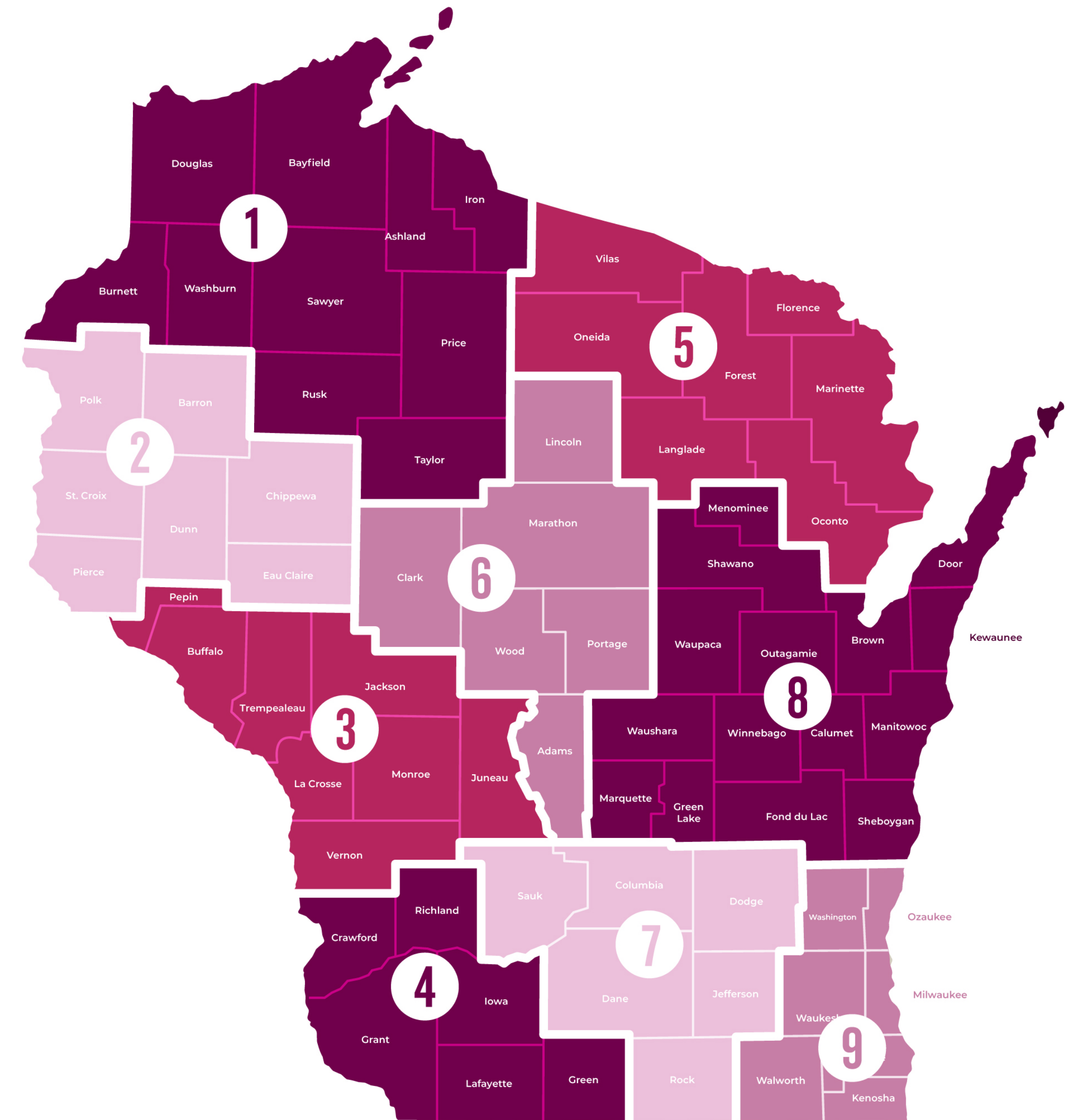
- The extent to which the applicant has demonstrated experience administering loan/grant funds.
- If proposing a RLF, then objectives, financing strategy, operational procedures, and a full summary of the applicant's organizational capacity to run an RLF must be provided.
- Application quality: application should be in great shape, answered all questions, not missing any documents, and the project is clear

Past SBDG Awards:

- The extent to which an applicant has received SBDG funds in the past. Applicants who have not previously received SBDG funds may be prioritized.

How to Apply

- Determine applicant and project eligibility
- Connect with a WEDC regional economic development director (REDD) or directly with Dana F (dana.foley@wedc.org)
 - Include:
 - Name of entity applying
 - Name/Email to receive application
- Dana F will send an online application through Network Wisconsin
- Complete and submit online application by Oct. 2 @ 5:00pm



Application: What's Needed?

➤ Online application

- Supporting documents
 - W9
 - Charting document (if applicable)
 - Nonprofit credentials (if applicable)
 - Detailed project description
 - Organizational leadership and project lead information
 - Sample application
 - Letters of support
 - Project budget
 - Three years of financial statements



SBDG Application

Please complete this field.

* Provide a description of the document submitted. ⓘ

Provide a brief description of the non-profit credentials for the organization.

* Is the applicant considered a non-profit entity? ⓘ

If the applicant is a non-profit, select yes. If the applicant is a business or organization other than a non-profit, select no.

Yes ▼

Please complete this field.

* Provide the credentials for the organization. ⓘ

Upload a copy of the credentials of the non-profit, such as a federal tax exemption determination letter.

Choose File(s)

SBDG Application

Project location is the same as Mailing Address. ⓘ

☐

* Proposed Project Start Date ⓘ

mm/dd/yyyy



* Project Description ⓘ

Provide an overview of your project within a couple paragraphs. Include the amount of SBDG funds being requested and how the project will support small businesses financially and, if applicable, through technical assistance. (Additional details will be provided in subsequent questions.) Max length: 250 words or about 3 paragraphs.

* Background and Structure of the entity. ⓘ

Describe the background and structure of the entity; its experience and capacity in providing small business support through grants, loans, rent assistance, mentorship, education or other services; and any existing partnerships or collaborative efforts with other small business support organizations in the community. Outline how the organization will grow and expand the small business ecosystem of the project's geographic area.

Project Curriculum or Technical Services Offered ⓘ

Provide a detailed description of the programming, curriculum, or technical services being offered through the program.

Application/Funding Process ⓘ

Provide a description of eligibility requirements for companies applying to the program; describe the application process and the criteria that will be used to (1) approve funding and program participation (2) select the type and amount of funding and program participation to approved applicants.

Please complete this field.

* Project Service Area ⓘ

Please provide the service area or target area of the project (city of X, County X, Streets XYZ, Neighborhoods XYZ, etc).

* Proposed Project End Date ⓘ

mm/dd/yyyy



* Detailed Project Description ⓘ [Small Business Development Grant Program Information](#)

If not already available, please review the Small Business Development Grant Program Guidelines found on the program website. Upload a detailed project description that expands on the summary provided above. Be sure to address each of the Scoring Criteria in the program guidelines as they relate to the proposed project and the applicant. Please address each criteria, even if they do not apply directly to the proposed project.

Choose File(s)

Organizational Leadership ⓘ

Please provide a summary of the organization's leadership. Please also provide the name, title, and background/resume of the individuals who will be managing the project.

Choose File(s)

Sustainable Operations Strategy ⓘ

Explain whether this project is expected to continue after WEDC funds have been utilized and how it will be funded.

Sample Application ⓘ

For projects that will require small businesses to go through an application process, provide a sample of the application that will be used.

Choose File(s)

SBDG Application

Collaborative Partner

Check the box if the applicant is collaborating or partnering with any other entities to manage this project? (e.g. Chambers of Commerce, Economic Development Organizations, Nonprofits, or local private companies)



Please complete this field.

* Collaborative Description

Please complete this field.

* Collaborative Partner Information

Please provide the name, address, and a brief description of the entity/entities collaborating with the applicant.

Letters of Support

Choose File(s)

External Collaborator

* Role 	* First Name	* Last Name	* Title	* Company	* Email	* Phone	* Street	* City	* State	* Zip Code
Project Contact 										

Add Row

SBDG Application

Number of grants to sub-recipients expected to be made. ⓘ	Estimated expected average grant size. ⓘ
Number of loans to sub-recipients expected to be made. ⓘ	Estimated expected average loan size. ⓘ
Expected number of jobs to be created by grant sub-recipients. ⓘ	Expected number of jobs to be retained by grant sub-recipients. ⓘ

Previous

Next

4	SMALL BUSINESS DEVELOPMENT GRANT				
5	USES OF FUNDING	SOURCES AND AMOUNTS OF FUNDING (If multiple funding sources for one expense, use multiple lines)			TOTAL
6		WEDC Amount	Match Source Name	Match Source Amount	
7					
8					
9					
10	DIRECT FUNDING TO BUSINESSES				
11	Grants				
12		\$ -		\$ -	\$ -
13		\$ -		\$ -	\$ -
14		\$ -		\$ -	\$ -
15		\$ -		\$ -	\$ -
16		\$ -		\$ -	\$ -
17	Loans				
18		\$ -		\$ -	\$ -
19		\$ -		\$ -	\$ -
20		\$ -		\$ -	\$ -
21		\$ -		\$ -	\$ -
22		\$ -		\$ -	\$ -
23	TOTAL	\$ -		\$ -	\$ -
24	* Note that Match must be a cash contribution and cannot be in kind.				
25	** Though staff time may be consumed to achieve outcomes, it is not counted as an expense.				
26					
27	Cell B23 lists the award amount; the total WEDC amount, rounded down to the nearest \$100				
28	Enter any notes on budget here				

Budget Template

4	SMALL BUSINESS DEVELOPMENT GRANT				
5	USES OF FUNDING	SOURCES AND AMOUNTS OF FUNDING			TOTAL
6		(If multiple funding sources for one expense, use multiple lines)			
7					
8					
9		WEDC Amount	Match Source Name	Match Source Amount	
10	DIRECT FUNDING TO BUSINESSES				
11	Grants				
12	Signage Grant	\$ 5,000.00	City	\$ 5,000.00	\$ 10,000.00
13	Vacancy Grant	\$ 10,000.00		\$ -	\$ 10,000.00
14		\$ -		\$ -	\$ -
15		\$ -		\$ -	\$ -
16		\$ -		\$ -	\$ -
17	Loans				
18	Facade RLF	\$ 50,000.00		\$ -	\$ 50,000.00
19		\$ -		\$ -	\$ -
20		\$ -		\$ -	\$ -
21		\$ -			\$ -
22		\$ -		\$ -	\$ -
23	TOTAL	\$ 65,000.00		\$ 5,000.00	\$ 70,000.00

Budget Example

- 24 * Note that Match must be a cash contribution and cannot be in kind.
- 25 ** Though staff time may be consumed to achieve outcomes, it is not counted as an expense.

27 Cell B23 lists the award amount; the total WEDC amount, rounded down to the nearest \$100

28 Enter any notes on budget here

Timeline

- Applications are open
- Applications due Oct. 2 @ 5:00pm
- Scoring period Oct. 12-26
- Winning applications contracted by Feb/Mar
- Winning applications publicly announced in 2027
 - *Must wait for WEDC to make announcement
 - **For those that need board approval/municipal resolution, may need to act ASAP for application deadline
- Project operating window: ~2 years



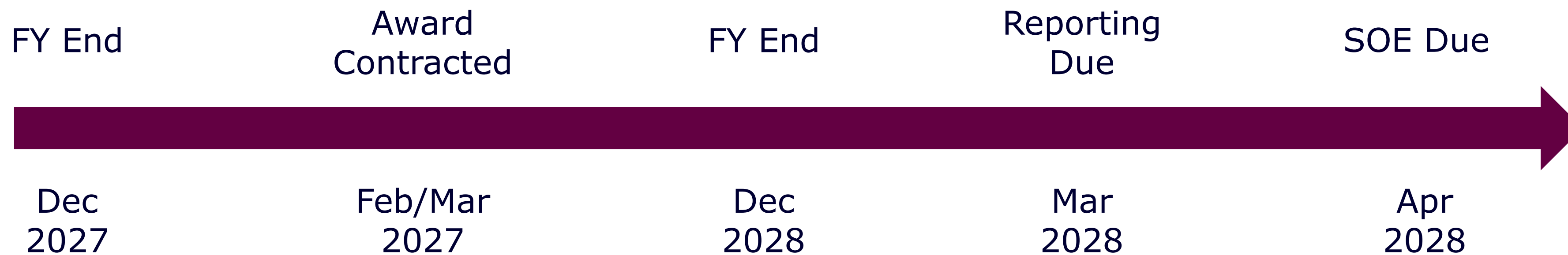
Disbursement Process

- Awards made on disbursement basis
- Requirements
 - Segregated bank account
 - Set up a bill.com account
 - Submit businesses selected to receive award
 - Submit proof of award
 - Submit Exhibit A Form
- ~3 weeks to complete disbursement

Other considerations

- Reporting requirements
- Schedule of Expenditures (SOE) requirement for awards of \$100,000 and up
 - Requires CPA engagement

Assuming a 12/31 Fiscal Year End Date



Office Hours

SBTA

- Aug 19: 9am-4pm
- Sept 16: 9am-4pm

- Contact Nichole for link to join

SBDG

- Aug 20: 9am-4pm
- Sept 17: 9am-4pm

- Contact Dana for link to join

Questions?

Dana Foley
Project Manager
dana.foley@wedc.org
608.210.6814

Nichole Crust
Director of Entrepreneurship
nichole.crust@wedc.org
608.210.6805

Thank you!

