A close up of a sign

Description automatically generated

**Thank you for expressing an interest in signing up to the whatimpact platform. We have developed a template of our Charity profiles to give you an idea of the information you need to fully complete your profile.**

**This document is for your use only - use it to consolidate your organisation's information in one place before uploading to the live site.**

|  |
| --- |
| Sign up  Email:  Password:  Full Name: |

|  |
| --- |
| Great to have your organisation signing up! Welcome to our matchmaking marketplace where companies and grant makers offering resources, and charities and social enterprises seeking resources, can connect and share with ease.  A few points for you to approve before continuing to your account:  1. By registering and creating a profile, I confirm that I am authorised to set up a whatimpact profile on behalf of my organisation.  2. I recognise that whatimpact is a matchmaking site, not a donation site. Donation transactions must be agreed externally between the parties matched.  3. whatimpact will upload comprehensive public data to the profiles monthly, for due diligence purposes. The data is auto-pulled from government sites and can be updated by profile admin by contacting the government sites directly. whatimpact is not responsible for updating or validating the profile data, on the behalf of any party. By creating an account you understand your responsibility to conduct your own due diligence, to the extent your organisation requires. We offer contact details and communication channels for this work.  4. When both the Supporter and Recipient have agreed a match, agreeing on the exchange of certain resources, we consider it a done deal. The data of the donation will then become public and present on your profiles. This activates related project greeting and impact reporting services for you to engage with your stakeholders. |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Create a whatimpact account  It's great to have your organisation sign up!  Which type of organisation do you represent?  Choose one of the following:   |  |  |  |  | | --- | --- | --- | --- | | **Charity**  **i: Recipient**  **Your organisation should be registered with The Charity Commission for England and Wales or Scottish Charity Regulator.**  **Create Account** | Social Enterprise  i: Recipient  Your organisation should be registered with Companies House, as a Social Enterprise. Your organisation must deliver the social value work directly to those in need. If you are wanting to finance other social organisations, then you should set up a Company profile instead. | Company  i: Supporter  Your organisation should be registered with Companies House. You can also set up a profile for a team, branch, department or larger registered Companies. | Grant Maker  i: Supporter  Your organisation should be registered with The Charity Commission for England and Wales or Scottish Charity Regulator. | |

|  |
| --- |
| Confirmation **You’re about to do something important** Great to have your charity on board! Now it's time to complete your organisation profile. Your profile includes some auto-filled information, which we have downloaded from the Charity Commission or Scottish Charity Regulator and 360 Giving data (where applicable). Plus there’s space for you to update information on your current beneficiary projects, your current needs for money, volunteering, goods and services and any commercial offerings you might have  In order for us to start matching your organisation with the offers grant-makers and companies are giving, you will need to update information on at least one project you are running. Once updated, you are free to apply for any of the offers on the site. Applications consist of a simple due diligence questionnaire and should take no more than 5 minutes to complete. We are all about saving your time and money, so that you can focus on what you do the best – delivering great social value to society! Good luck with your applications! |

|  |
| --- |
| Create a Charity Account  Find your charity  whatimpact lists all charities in England, Wales and Scotland using information downloaded from The Charity Commission for England and Wales or Scottish Charity Regulator. To set up your profile, you will have the option to select your charity from a list.  Registration number: ………………………………………………………………………………………... |

|  |
| --- |
| Select and claim your charity  Once you have found your charity using the search functionality, you will need to claim your profile. You can then update your account, core profile and projects, to receive the offers grant makers and companies are giving.  **We have done half the work for you by downloading information from The Charity Commission for England and Wales or the Scottish Charity Regulator and 360Giving.** |

|  |  |  |  |
| --- | --- | --- | --- |
| Core profile  Some information will be automatically collected from The Charity Commission for England and Wales or Scottish Charity Regulator. We update this on a monthly basis.  **If you wish to edit any of the data please contact the government sites directly. Any amendments can take up to two months to update.**  Organisation Details:  Trading name ………………………………………………………………………………………………...  i: This is your charity trading name. It may be the same as your registered name.  Registered name ……………………………………………………………………………………………  i: This is your organisation name, registered with The Charity Commission for England and Wales or the Scottish Charity Regulator.  Organisation type  You will have the option to choose one of the following:  The Charity Commission for England and Wales  Scottish Charity Regulator  Organisation number …………………………………………………………………………………  i: This is your Charity Commission for England and Wales or Scottish Charity Regulator number.  Year of registration …………………………………………………………………………………………  i: What year did you register your charity?  Parent organisation  Are you part of or governed by another organisation (other charity, company or social enterprise)?  Do you have a parent organisation? Yes / No  Please describe this relationship.   |  | | --- | | …………………………………………………………………………………………………………………  ……………………………………………………………………………………………. 0/250 characters. |   Your Logo  Chose file.  We will ask you for your logo in one of the following formats:  File should be min 400px x 400px, JPG or PNG and not more than 10MB  Key Image  Chose file. File should preferably be 1920px x 1080px, JPG or PNG and not more than 10MB  i: Please include a photo that reflects the spirit of your organisation and your work.  Instagram  So whatimpact users can stay connected and up to date with your work, link your Instagram.  Instagram: https://………………………………………………………………………………………….  i: We push traffic towards your projects through public promotions via social media and blogs.  Tagline  0/80 characters ……...……………………………………………………………………………………  i: A short catchphrase or slogan that indicates your charity goal. Our search engine helps the public & companies to find, support and collaborate with your organisation. Make sure your tag line includes buzzwords to connect you to the right match.  Your Operation  Brief History  Please give a brief history of your operation.   |  | | --- | | …………………………………………………………………………………………………………………  ………………………………………………………………………………………………………………...  …………………………………………………………………………………………… 0/350 characters. |   Vision for the future  Please describe your vision for the future.   |  | | --- | | …………………………………………………………………………………………………………………...  ……………………………………………………………………………………………………………………  …………………………………………………………………………………………….... 0/350 characters. |   i: What is the future world your organisation wishes to build?  Charity shops  i: Number of charity shops attached to your organisation ………………………………………………….  Your goals to make a difference  What are the changes that your charity wishes to make in society? Measurable short and longer term progress caused by your activity and work.  Please enter up to 5 outcome goals, 0/100 characters each:  1.  …………………………………………………………………………………………………………………..  2.  …………………………………………………………………………………………………………………..  3.  …………………………………………………………………………………………………………………..  4.  …………………………………………………………………………………………………………………..  5.  …………………………………………………………………………………………………………………..  i: Examples:  - People are lifted from poverty through employment and managing their mental health challenges. |

|  |
| --- |
| Your cause and area of interest  Drop down list of options: you’ll be able to choose one or multiple examples of the cause your charity is working to support and your areas of interest.  For now, you can list them here:  ……………………………………………………………………………………………………………………...  ……………………………………………………………………………………………………………………...  i: Including your causes helps whatimpact users find you. These filters harness AI technology to match organisations based on shared values and areas of interest.  Examples:  - Education  - Health  - Homelessness |

|  |
| --- |
| Your Reach  Beneficiaries - Who will benefit from this project?  Drop down list of options: You’ll be able to choose one or multiple examples.  Examples:  - Young people  - Nature  - Animals  - People with disabilities  Please describe more specifically who your beneficiaries are and how you work with them.  Specific description:  ……………………………………...……………………………………………………………………………  ……………………………………...………………………………………………….... 0/250 characters  i: We advise you to carefully select your beneficiaries as this is one of the filter based matchmaking criteria. You can choose one or multiple beneficiaries from a drop down list. |

|  |
| --- |
| Please define your geographic areas of activity:  Drop down list of options: You’ll be able to choose one or multiple examples.  Where is your area of outreach?  Country of operation:  ……………………………………………………………................................................  Region of operation:  …………………………………………………………….................................................  District of operation:  ……………………………………………………………..................................................  i: We advise you to carefully select your areas as this is one of the filter based matchmaking criteria. |

|  |
| --- |
| Financial Performance  whatimpact encourages transparent information for due-diligence and decision making processes, saving time and establishing trust.  All this data will be automatically filled in and collected from The Charity Commission for England and Wales or Scottish Charity Regulator. We update this on a monthly basis. If you wish to edit any of the data please **contact the government sites directly**. Any amendments can take up to two months to update.  Here are examples of the data that will be displayed.  Income  Donations and legacies: £  Other trading activities: £  Investments: £  Charitable activities: £  Other: £  Expenditure  Raising funds: £  Charitable activities: £  Other: £  Assets & Liabilities  Own use assets: £  Defined benefit pension scheme asset liability: £  Total liabilities: £  Long term investments: £  Other assets: £  Financial History  Income and Spending  Expenditure  Annual return and accounts  Fundraising  Trading  Gift Aid  Charitable Spending Ratios  Charitable spending: %  Group income available for charitable activities: %  Retained: %  Charity Comment on Financials  Please detail where your money comes from, how it's spent and any future plans as a charity to grow  or change. This transparent approach gains trust from potential funders and the public.  ……………………………………………………………………………………………………………………  ……………………………………………………………………………………………………………………  ……………………………………………………………………………………………… 0/350 characters |

|  |
| --- |
| Testimonials  Please provide a testimonial from a project funder.  ……………………………………………………………………………………………………………………  …………………………………………………………………………………….………… 0/250 characters  Who said this?:  ……………………………………………………………………………………………………………………  Who do they work for?:  ……………………………………………………………………………………………………………………  Logo: File should be min 400px x 400px, JPG or PNG and not more than 10MB  Beneficiary Testimonial  Please provide a testimonial from a project beneficiary  ……………………………………………………………………………………………………………………  ……………………………………………………………………………………………… 0/250 characters  Who said this?:  ……………………………………………………………………………………………………………………  Who do they work for?:  ……………………………………………………………………………………………………………………  Logo: File should be min 400px x 400px, JPG or PNG and not more than 10MB  Remember to save all changes on the live site!  How To Help  Let people know what kind of support your organisation needs.  Although your charity can actively apply for offers from grant makers and companies, you can also create a comprehensive list of resources that you would like. Specify each request and add a link, providing information on how to get in touch. On the live site, you will be able to add multiple requests.  **Money**  How and what to donate:  ……………………………………………………………………………………………………………………  i: Examples:  - fundraising help  - one off donation  - legacy  Link option: https://…………………………………………………………………………………………….  **Skills & Time (volunteers)**  11M adults in the UK get paid time for volunteering, but only a fraction use the opportunity.  Utilise skilled volunteers, with knowledge and expertise, specific to your organisation's needs.  On the live site, you will be able to add multiple requests.  List the voluntary services you are looking for:  ……………………………………………………………………………………………………………………  i: Examples:  - Marketing: helping to deliver a campaign, updating social media, delivering PR activities  Link option: https://……………………………………………………………………………………………..  Include links to projects that would benefit from skilled volunteers.  **Products**  Being specific about what you need helps you to get the best offers and saves time.  On the live site, you will be able to add multiple requests.  Product donations required:  ……………………………………………………………………………………………………………………  Link option: https://……………………………………………………………………………………………..  Include links to projects that would benefit from products and resources.  **Services**  ……………………………………………………………………………………………………………………  Examples:  - pro bono professional work (legal, web, business strategy, design etc).  Link option: https:// …………………………………………………………………………………………....  **Buy From Us**  Please describe any products or services you have for sale.  This is a space to promote your organisation’s products or services, so that companies or individuals can support your activity. This could be your organisation's branded merchandise, venue space or training courses. You can add multiple options on the live site.  …………………………………………………………………………………………………………………….  …………………………………………………………………………………………………………………….  .……………………………………………………………………………………………………………………  Link option?: https:// …………………………………………………………………………………………….  Add an image?: File should preferably be 1920px x 1080px, JPG or PNG and not more than 10MB |

|  |
| --- |
| Diligence  Information on your financial status encourages transparency and trust, leading to more successful collaborations. This information is stored securely and will only be shared as part of a support application process.  Some of this information will be automatically collected from The Charity Commission for England and Wales or Scottish Charity Regulator. We update this on a monthly basis. If you wish to edit any of the data please **contact the government sites directly**. Any amendments can take up to two months to update.  People  Your key employers:  Trustees  ……………………………………………………………………………………………………………………  ……………………………………………………………………………………………………………………  ……………………………………………………………………………………………………………………  Employees  ……………………………………………………………………………………………………………………  ……………………………………………………………………………………………………………………  ……………………………………………………………………………………………………………..…….  Volunteers  …………………………………………………………………………………………………………………...  ………………………………………………………………………………………………………………..…..  …………………………………………………………………………………………………………………….  Board of Trustees  ……………………………………………………………………………………………………………………  ……………………………………………………………………………………………………………………  ……………………………………………………………………………………………………………………  i: It is very important to have an up to date list of trustees, for due diligence purposes. You can edit this list at any time and attach trustee Linkedin profiles.  Annual Report  Please upload your annual report: Max uploaded file size is 10MB  Paste a link to your 360Giving profile  https:// …………………………………………………………………………………………………………  i: Optional section.  If your charity has received a grant or grants from any grant maker listed on 360Giving grant database, please visit<http://grantnav.threesixtygiving.org/recipients>and copy paste your charity profile link here to demonstrate the grants you´ve received in the past. It is important for potential new grant makers to see who else has supported your organisation |

|  |
| --- |
| Contact Details  Make sure people can find you.  Your website: ..…..……………………………………………………...…………………………………….  Primary email: ..…..……………………………………………………...……………………………………  Telephone (incl area code): …………………………………………...……………………………………..  Please note the phone number and email address that you provide will only be visible to other profile admin. Although social media and website links are visible to the public, our messaging service is intended to be the primary communication channel for whatimpact members.  Social Media  To help others stay current, connected and up to date with your work, link your social media accounts.  We push traffic towards your projects through public promotions via social media and blogs.  Add links: https:// ………………………………………...…………………………………………………....  Add links: https:// ………………………………………...…………………………………………………....  i: Examples: Twitter, Facebook, Youtube, Linkedin  **Congratulations, your core profile is all done! In order to start matching with companies and grant makers, go to your dashboard and create at least one project.** |

|  |
| --- |
| Create a project  It is time for you to describe a project your organisation is running. To apply for resources, you must have at least one project present on your profile. You can list any many projects if you like. Projects are the most important parts of your application, so please provide as many details as you can. These details will be automatically included in your social impact reporting.  Project name ………………………………………...………………………………………………….......  Please provide a short description of your project.  ………………………………………...…………………………………………………….............................  ………………………………………...…………………………………………………….............................  ………………………………………...…………………………………………………….............................  ………………………………………...…………………………………………………….............................  ………………………………………...…………………………………………………… 0/500 Characters  i: This is your elevator pitch. Give whatimpact members an idea of what you are doing and what you  are trying to achieve.  Project size per annum: £ .…………………………………...……………………………………………  Project beneficiaries or target  Who or what benefits from this project? There will be a dropdown list on the main site, for you to choose from. Add as many as you see appropriate.  ………………………………………...……………………………………………………..............................  Please provide any relevant details.  ………………………………………...……………………………………………………..............................  ………………………………………...……………………………………………………. 0/250 characters  Total beneficiaries  To get an idea of the scale of this project, approximately how many beneficiaries or targets do you aim to reach? Only complete this section if you have beneficiary targets for your overall target.  How would you categorise your beneficiaries or target? Choose between:  Number of beneficiaries / Reach of work  How many beneficiaries or targets do you aim to reach in the overall project? (optional)  ………………………………………...……………………………………………………..............................  Please provide any further comments.  ………………………………………...…………………………………………………….... 0/60 characters  Annual beneficiaries  This is your business as usual reporting period for this specific project  How would you categorise your beneficiaries or reach?  ………………………………………...……………………………………………………...............................  Please provide any relevant details.  ………………………………………...…………………………………………………….... 0/60 characters  Project timeline  Start date to end date or ongoing  ………………………………………...……………………………………………………...............................  Your reporting periods on whatimpact: Quarterly / Bi- Annually  i: For social impact reporting, let whatimpact know how your project is going.  Key image  File should preferably be 1920px x 1080px, JPG or PNG and not more than 10MB  Include an image to give supporters a better idea of the project mission.  Project goals  These are the outcomes that you are trying to achieve. Either describe the change that you wish to create or quantify them. 0/100 characters  1. ………………………………………...……………………………………………………..........................  2. ……………………………………...……………………………………………………..............................  3. ……………………………………...……………………………………………………..............................  Project activities  How are you actively engaging with your reach? What are you practically doing to instigate change?  0/100 characters  1. ………………………………………...……………………………………………………...........................  2. ……………………………………...……………………………………………………..............................  3. ……………………………………...……………………………………………………..............................  4. ……………………………………...……………………………………………………..............................  5. ……………………………………...……………………………………………………..............................  Please describe how you montior the quality of your work:  ………………………………………...……………………………………………………..............................  Is your project aligned to the following UN Sustainable Development Goals (SDG)?  Please select the UN sustanable development goal that alligns with your project. This will be availble to pick from a dropdown list.  ………………………………………...……………………………………………………..............................  Geographic reach of the project  You can choose multiple locations. Dropdown list.  We advise you to carefully select your areas as this is one of the filter based matchmaking criteria.  Country of operation: …………...……………………………………………………..................................  Region of operation: …………...……………………………………………………...................................  District of operation: …………...……………………………………………………....................................  Who is already funding this project?  To establish trust amongst supporters and for due diligence purposes, please include existing funders.  Name:  ………………………………………...…………………………………………………….............................  More details:  ………………………………………...…………………………………………………….............................  Please add a link to their website:  ………………………………………...…………………………………………………….............................  Other Partners  Who else do you collaborate with?  Name:  ………………………………………...……………………………………………………..............................  More details:  ………………………………………...……………………………………………………..............................  Please add a link to their website:  ………………………………………...…………………………………………………….............................. |

**Thank you for completing your whatimpact profile template. You are all ready to go!**

**Once your profile goes live, you’ll be able to find supporters that have automatically matched to your profile, start applications for exciting opportunities, check your inbox, talk directly through our communication channel and use settings to keep your account up to date.**

**See you then,**

**whatimpact team**