

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

**This document is for your use only - you can use the information collected in this template when whatimpact goes live, speeding up your account activation process.**

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| Sign upEmail:Password:Full Name: |

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| 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. |

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| Create a whatimpact accountFirstly, which organisational type do you represent? Choose one of the following.

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| Charityi**:** RecipientYour organisation should be registered with The Charity Commission for England and Wales or Scottish Charity Regulator.  | Social Enterprisei: RecipientYour 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.  | Companyi: SupporterYour 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.****Create account** |

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| Confirmation**You’re about to do something important**Great to have you on board as a grant-maker! Now it is time to complete your organisation's profile. Your profile consists of some core information on your organisation which we download from the Charity Commission/Scottish Charity Register and 360 Giving (where applicable). It also includes space to outline all the offers you will be making for charities and social enterprises. You will be suggested Recipient organisations to match with, but we also offer a filtering tool for you to find your own partners from our database.In order us to start matching your organisation, you must place at least one grant offer. This allows you to start discussing with other organisations on our communication panel and to receive proposed matches and applications. |

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| Find your charitywhatimpact 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 and then **Claim.** Registration number: |
| On the live site, you will be directed to a page that breaks down your profile into:Core ProfileHow To HelpDiligenceContactClick on the section you want to update and start creating your profile. |

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| Core profileAdd to the information provided by The Charity Commission for England and Wales or the Scottish Charity Regulator to take your profile to the next stage. **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.**Trading name ……………………………………………………………………………………………...i: This is your whatimpact account grant maker trading nameRegistered name …………………………………………………………………………………………i: This is your name, registered with The Charity Commission for England and Wales or Scottish Charity Regulator.Organisation typeYou will have the option to choose one of the following:The Charity Commission for England and WalesScottish Charity RegulatorOrganisaition number ……………………………………………………………………………………i: This is your Charity Commission for England and Wales or Scottish Charity Regulator number.Year of registration ….……………………………………………………………………………………Your logo: File should be min 400px x 400px, JPG or PNG and not more than 10MBKey image: File should preferably be 1920px x 1080px, JPG or PNG and not more than 10MBi: Please include a photo that reflects the spirit of your organisation and your work.Instagram This will be shown on your profile page. 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.OrganisationPlease give a brief history of your operation

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| ……………………………………………………………………………………………………………….………………………………………………………………………………………… 0/80 characters. |

Describe your buisness

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Your Social mission

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i: What is the social value your company wishes to contribute to society? Your social purpose and action. |

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| Your goals to make a differencePlease enter up to 5 goals, 0/100 each:1. ………………………………………………………………………………………................................2. ………………………………………………………………………………………................................3. ……………..……………………………………………………………………………………................4. ……………..……………………………………………………………………………………................5. ……………..……………………………………………………………………………………................i: what are the changes that your organisation wishes to help make in society? Measurable short and longer term progress that your company wants to support.Examples:- We wish to help beneficiary organisations to develop their strategies and operations so they can grow and have more impact.- We want to support young people to feel excited about their future by informing them on work and educational opportunities. |

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| Cause & area of interestOn the live site, you will be able to pick multiple examples of the causes your organisation wants to support and your areas of interest from a dropdown list.These filters harness AI technology to match organisations based on shared values and areas of interest.1. …………………………………………………………………………………………...............................2. ……………………………………………………………………………………….................................3. ……………..………………………………………………………………………………………...............i: Examples of causes and areas of interest:- Education- Arts & Culture- Health |

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| Geographic focus areaPlease define your geographical areas of activity. On the live site, you will be able to pick from a dropdown list and add multiple locations.Country of operation: ………………………………………………………...............................................Region of operation: ………………………………………………………................................................District of operation: ……………………………………………………….................................................i: Please define your geographical areas of activity. Including your causes helps whatimpact members find you. These filters harness AI technology to match organisations based on shared values and areas of interest. |

There will be a ‘Financial Performance’ section, listing your organisation’s financial data, collected from the Charity Commission or Scottish Charity Regulator. If any of this data is incorrect, please contact the sites directly and the information will in turn be automatically updated onto our site site. Any amendments can take up to two months to be updated on our site.

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| How you helpLet people know how your organisation helps annually, this includes what is done outside of this platform.Top of FormBottom of FormAnnual grant programmesPlease describe your grant programme. Programme name:……………..…………………………………………………………………………………………................Annual Size of this programme: £ ….…………………………………………………………….................Average size of grant: £ ……………………………………..…………..……………………………….......Number of grants given annually: ………………………………………………………………..................i: You can add more grant programmes on the whatimpact site.Social impact reportFile should be a maximum of 10Mb and in PDF format. |

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| DiligenceSome of this data will already be collected from the Charity Commission or the Scottish Charity Regulator. Please contact them directly to make changes. Number of trustees:Number of employees:Number of volunteers:Trustee LinkedIns:…………..……………………………………………………………………………….................…………..……………………………………………………………………………….................Upload Annual Report: Max uploaded file size is 10MB360Giving profile: https:// …………………………………………………………………………...............................i: This is optional if your charity has received a grant or grants from any grantmaker listed on 360Giving database.  |

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| Contact details Your website: https:// ……………………………………………………......……………………………..Primary Email: ….………………………………………......………………………………………….......Telephone (incl area code): ……………………………………………………......……………………..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, Instagram |

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| **Congratulations, your core profile is all done!** **In order to start matching with charities and social enterprises, go to your dashboard and create at least one offer.** |

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| Create Offers:Time to make an offer!Let recipients know what you have to offer. whatimpact encourages supporters to give in a transparent and efficient way. Create a Money offerOffer name: ………………………………………………………………….........................Type of donation: restricted / unrestrictedPayment duration: one off / paid in installmentsSocail impact report required?: YES / NODefine the value of this support: £I: We recommend that your minimum donation is £1,000. If you donate £5,000+ you are eligible for a social impact report. Please tick if you would like to receive a report.Private? : YES/ NOI: Our private option means that information is only visible to supporter or recipient profile admins. If possible, we recommend that you state the value of your donation.More donation details:……………..……………………………………………………………………………………….................……………..……………………………………………………………………………………….................……………..………………………………………………………………………………………................……………..……………………………………………………………………………………...................……………..……………………………………………………………………….….. 0/400 Charactersi: This gives applicants a better idea of whether the offer is suitable for them to apply.CriteriaPlease describe the eligibility requirements for this offer. This is the public description of the criteria for the donation.……………..………………………………………………………………………………….....................……………..……………………………………………………………………………………..................……………..……………………………………………………………………………………..................……………..………………………………………………………………………………………...............……………..……………………………………………………………………….….. 0/400 CharactersDue diligence criteria – YES / NO (private between you and recipient admin)Please add a question to assess the relevance of the application that require a YES/ NO response. The recipient will then be able to write a short comment in response, with more detail for your consideration. You can add up to five questions, 0/200 characters each.1. ………………….……………………………………………………………………………………….2. …………………….…………………………………………………………………………………….3. …………………….…………………………………………………………………………………….4. ………………….……………………………………………………………………………………….5. …………………….…………………………………………………………………………………….Example:- Have you already secured funding for this operation? Would this grant be top-up funding?Due diligence - reasons to work together (private between you and recipient admin)What else would you like to learn about your recipient applicants?Ask open questions which help you make decisions on which organisations and their projects you´d be shortlisting. You can also ask additional information from the organisations after they have applied via your communication dashboard.You can add multiple questions to assess the relavence of the application.……………………….……………………………………………………………………………………….……………………….……………………………………………………………………………………….……………………….……………………………………………………………………………………….……………………….…………………………………………………………………. 0/400 charactersi: Example: Why should your organisation receive our grant? What do you see the impact of the contribution to be? |

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

**Once your profile goes live, you’ll be able to find recipients that have automatically matched to your profile, shortlist applicants, check your inbox, talk to through our communication channel and use settings to keep your account up to date.**

See you then,

whatimpact team