

**Thank you for expressing an interest in signing up to the whatimpact platform.**

**We have developed a template of our charity profile to give you an idea of the information you will need to fully complete your online profile.**

**This document is a preparatory tool. When you are ready, copy and paste your collected data into the online profile to speed up your account activation process.**

|  |
| --- |
| **Sign up**Email:Password:Full Name:i: On the live site, we recommend that you use the main sign-up portal, rather than the Google option. |

|  |
| --- |
| **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.i: More T&C’s and whatimpact’s Privacy Policy are available on the website  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Create a **whatimpact** accountIt'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 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 Makeri: SupporterYour organisation should be registered with The Charity Commission for England and Wales or Scottish Charity Regulator. |

 |

|  |
| --- |
| **Confirmation*** Allow 40-60mins to complete your core profile and 20-30 minutes to add an activity
* It can take 20-30 mins to add 1-2 activities
* For your profile to be public on **whatimpact**, complete all mandatory profile fields
* Profiles with activities / offers rank first (for matching)

**Steps to creating your account.**1. Create your public profile. Include organisation information and list the monetary donations, products, services, and skilled volunteers you seek. Auto-filled financial information is downloaded from the Charity Commission/Scottish Charity Register and 360 Giving data (where applicable).2. Add one or multiple activities. These can be your overall charitable activity or one off, more specific campaigns.3. Apply to offers. See which offers **whatimpact** has suggested you match with and apply. Applications consist of a simple due diligence questionnaire and should take no more than 5 minutes to complete.4. Check your Inbox to see if you have any response on 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 activities, 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.**  |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Create profile - 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.**Pop-up information bubbles will guide you through the process of creating your account.**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:**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 (250 characters)

|  |
| --- |
|  |

**Your logo**We will ask you for your logo in one of the following formats:File should be min 800px x 800px, JPG and not more than 10MB.**Key image**File should preferably be 1920px x 1080px, JPG, 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.https://i: We push traffic towards your projects through public promotions via social media and blogs.**Tagline** (80 characters)

|  |
| --- |
|  |

i: A short catchphrase or slogan that indicates your charity goal. 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. (350 characters)

|  |
| --- |
|  |

**Vision of the future** Please describe your vision for the future. (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 (you must have at least 1 goals). (160 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**Choose one or multiple examples of the cause your charity is working to support:

|  |  |
| --- | --- |
| Abuse  | Girls & Women |
| Agriculture | Health & Wellbeing |
| Animal Welfare | Heritage & History |
| Arts & Culture | Housing |
| Boys & Men | Human Rights |
| Carer Support | Mental Health |
| Climate Change | Military & Public Services |
| Community | Poverty |
| COVID-19 Recovery | Recycling |
| Crime & Rehabilitation | Religion |
| Disorders | Rescue & Disaster |
| Diversity & Inclusion | Sanitation |
| Education | Schools, Disability |
| Elderly | Sports & Recreation |
| Employment | Village Halls |
| Environment | Waste |
| Equal Opportunity | Water |
| Food & Hunger | Wildlife |
|  | Youth & Young Adults |

 |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Your reach**Beneficiaries - Who will benefit from this project?

|  |  |
| --- | --- |
| Children / Young People | Other Charities or Voluntary Bodies |
| Elderly / Old People | The General Public / Mankind |
| People of Particular Ethnic / Racial Backgrounds | Nature |
| Adults | Animals |

Please describe more specifically who your beneficiaries are and how you work with them.Specific description: (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 dropdown list. |

|  |
| --- |
| **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: 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.Data will be automatically filled in from The Charity Commission for England and Wales or Scottish Charity Regulator. We update this monthly. 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.Charity Comment on FinancialsPlease detail where your money comes from, how it's spent and any future plans as a charity to grow or change. (350 characters)

|  |
| --- |
|  |

  |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Testimonials****Partner testimonial**Please provide a testimonial from a partner. (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 or client that you have served. If the work that you do is sensitive, please use 'Anonymous'. (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**You have now completed your Core Profile! Make sure your profile is on Public mode so that supporter organisations can see the work you do.****The next stage is to fill in your How To Help section. Please scroll onto the next page to continue your application. On the live site, you can find your How To Help section by visiting your Dashboard.** |
| **How to help**Let people know what kind of support your organisation needs. A pop-up will guide you through this section on the live site. Use this section to list ways that **whatimpact** members or the general public can support your work. Ask for the money, services, products or skilled volunteers you seek. Add links to each request to help direct traffic to your existing sites. For example, write 'donation' and add a link to your JustGiving page. The more specific you are with your needs, the more likely partners or supporters will be found. On the live site, you will be able to add multiple requests.**Money**Although your organisation can actively apply for offers from companies and grant maker, you can also create a comprehensive list of resources that your organisation needs. Specify each request and add a reference link. This information will be public, so you may get offers from the public.Select from: Donate [ ]Fundraise [ ]Leave a gift in your will [ ]Restricted grants [ ]Unrestricted grants [ ]Description (40 characters)

|  |
| --- |
|  |

**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.Select the voluntary services you are looking for from the options and add descriptions (40 characters)

|  |
| --- |
|  |

Options:-Administrative, Arts & Culture, Befriending, Construction & Manual Labour, Education/Coaching, Finance, Fundraising, Health Care, HR, Innovation, IT, Legal, Logistics, Marketing, Mixed Skills Project, Operations Management, Other, property Management**Products** Does your organisation need any product donations? These could be water bottles, books, IT equipment etc. Include links to activities that would benefit from products and resources.Product donation Options: Animals, Baby & Child, Clothing & Footwear, Construction & Building, Disability, Electronics, Free Tickets, Groceries & Toiletries, House & Garden, Medical, Sport & Leisure, TransportAdd specifics and a description to each option. **Services**Does your organisation need any service donations? Service donation options:Cleaning, Construction Support/Manual Labour, Decorating and Maintenance, Equality & Diversity Training, Finance, Fundraising, Gardening, Healthcare/Medical, IT/Tech, Legal, Media and Marketing, Property/Venues Add specifics and a description to each option. **More Ways you can help**Add more ways your organisation needs help (500 characters)

|  |
| --- |
|  |

**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. (350 characters)

|  |
| --- |
|  |

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. 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**Number of Employers: Number of Volunteers: Number of Trustees:Trustee LinkedIn profiles:

|  |
| --- |
|  |

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 in PDF format**Paste a link to your 360Giving profile** https:// i: 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): …………………………………………...……………………………………..Address: ..…..……………………………………………………...…………………………………………..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**Clicking ‘Complete Profile’ will take you back to your dashboard.**  |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Create an activity**It is time for you to list an activity your organisation is running. To apply for resources, you must have at least one activity **published** on your profile. You can publish as many activities as you like. Activities 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.You can save your activity as a draft, to edit at a later date. When you are ready, **publish** your activity to start the matching process and receive offers.Companies and grant makers will only see all the details of your application and your full profile when they are logged-in to whatimpact.com.**Activity name**

|  |
| --- |
|  |

**Description of your activity** (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:** £ **Activity beneficiaries or target**Who or what benefits from this activity? Add as many as you see appropriate.

|  |  |
| --- | --- |
| Children / Young People | Other Charities or Voluntary Bodies |
| Elderly / Old People | The General Public / Mankind |
| People of Particular Ethnic / Racial Backgrounds | Nature |
| Adults | Animals |

Please provide any relevant details. (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 activity?

|  |
| --- |
|  |

Please provide any further comments. (0/60 characters)

|  |
| --- |
|  |

**Annual beneficiaries**This is your business as usual reporting period for this specific activity.How would you categorise your beneficiaries or reach?

|  |  |
| --- | --- |
| Children / Young People | Other Charities or Voluntary Bodies |
| Elderly / Old People | The General Public / Mankind |
| People of Particular Ethnic / Racial Backgrounds | Nature |
| Adults | Animals |

Please provide any relevant details. (0/60 characters)

|  |
| --- |
|  |

**Activity timeline**Start date: xx/xx/xxxxEnd date: xx/xx/xxxxOngoing: [ ]**Your reporting periods on whatimpact:** Quarterly: [ ]Bi- Annually: [ ]**Key image**File should preferably be 1920px x 1080px, JPG or PNG and not more than 10MBInclude an image to give supporters a better idea of the project mission.**Activity 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 characters1. (0/100 characters)

|  |
| --- |
|  |

2. (0/100 characters)

|  |
| --- |
|  |

3. (0/100 characters)

|  |
| --- |
|  |

**Project activities**How are you actively engaging with your reach? What are you practically doing to instigate change?0/100 characters1. (0/100 characters)

|  |
| --- |
|  |

2. (0/100 characters)

|  |
| --- |
|  |

3. (0/100 characters)

|  |
| --- |
|  |

4. (0/100 characters)

|  |
| --- |
|  |

5. (0/100 characters)

|  |
| --- |
|  |

Please describe how you monitor the quality of your work:(0/100 characters)

|  |
| --- |
|  |

**Is your activity aligned to the following UN Sustainable Development Goals (SDG)?**Please select the UN sustainable development goal that aligns with your project. This will be available to pick from a dropdown list.

|  |
| --- |
|  |

**Geographic reach of the activity:**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 activity?**To establish trust amongst supporters and for due diligence purposes, please include existing funders. Name:

|  |
| --- |
|  |

More details (0/100 characters)

|  |
| --- |
|  |

Please add a link to their website: https://**Other partners**Who else do you collaborate with?Name:

|  |
| --- |
|  |

More details (0/100 characters)

|  |
| --- |
|  |

Please add a link to their website: https:// |

**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**