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 upcoming Social Enterprise 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 up  Email:  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** account Firstly, which organisational type 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. | **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.**  **Create account** | 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. | |

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| Confirmation **You’re about to do something important** Great to have your social enterprise on board! Now it's time to complete your organisation profile. Your profile includes some core information on your organisation, plus space for you to update details of 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 must complete information on at least on 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. Good luck with your applications! |

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| Core profile  Your Social Enterprise  Trading name ………………………………………………………………………………………………...  i: This is your **whatimpact** account trading name.  Registered name …………………………………………………………………………………………...  i: This is your organisation name, registered with the Companies House.  Organisation type: There will be a dropdown list of different types of organisations.  Organisation number: ……………………………………………………………………………………  i: This is your Company House Registration number.  Year of registration ………………………………………………………………………………………...  Companies House URL …………...…………………………………………………………….……….. i: Use this link to find your company details and copy paste your Companies House profile.  <https://www.gov.uk/get-information-about-a-company>  Your logo: File should be min 400px x 400px, JPG or PNG and not more than 10MB  Key images: Files 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.  Tagline  0/80 characters ……...……………………………………………………………………………………  i: A short catchphrase or slogan that indicates your 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.  Instagram profile  So **whatimpact** users can stay connected and up to date with your work, link your Instagram. This will show on your profile.  Instagram: https://………………………………………………………………………………………….  i: We push traffic towards your projects through public promotions via social media and blogs  Your Social Enterprise  Brief History   |  | | --- | | ………………………………………………………………………………………………………………….  ………………………………………………………………………………………………………………….  …………………………………………………………………………………………… 0/350 characters. |   Vision for a better future  Please describe your vision for the future.   |  | | --- | | ………………………………………………………………………………………………………………….  ………………………………………………………………………………………………………………….  ………………………………………………………………………………………….... 0/350 characters. |   i: What is the future world your organisation wishes to build?  Number of charity shops attached to your organisation:  Your goals to make a difference  What are the changes that your organisation 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 each:  1.  ………………………………………………………………………………………………………………...  2.  ………………………………………………………………………………………………………………...  3.  ………………………………………………………………………………………………………………...  4.  ………………………………………………………………………………………………………………...  5.  ………………………………………………………………………………………………………………...  i: Examples:  - People are lifted from poverty through employment and managing their mental health challenges.  - Water quality in the Thames estuary becomes less polluted, providing a recreational, safe place for people to enjoy. The purer water also encourages wildlife. |

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| Your cause and area of interest  There will be a dropdown list of examples of the causes your social enterprise is working to support and your areas of interest. Please add as many as you need.  Examples:  - Education  - Health  - Employment  …………………………………………………………………………………………………………………...  …………………………………………………………………………………………………………………...  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. |

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| Your Reach  Project Beneficiaries:  Please describe more specifically who your beneficiaries are and how you work with them.  These will be presented in a dropdown list and you can choose one or multiple beneficiaries.  Beneficiaries: …………………………………………………………….............................................  Examples:  - Children/ Young People  - Animals  - People with disability  Specific Direction:  …………………………………………………………………………………………………………………...  ……………………………………………………………………………………………. 0/250 characters  Please define you geographical area of activity:  These will be presented in a dropdown list and you can choose one or multiple locations.  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. |

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| Testimonials  Please provide a testimonial from a project partner  …………………………………………………………………………………………………………………...  ……………………………………………………………………………………………. 0/250 characters  Who said this?  …………………………………………………………………………………………………………………...  Who do they work for?  …………………………………………………………………………………………………………………...  Upload logo: File should be min 400px x 400px, JPG or PNG and not more than 10MB  Please provide a testimonial from a project beneficiary:  …………………………………………………………………………………………………………………...  ……………………………………………………………………………………………. 0/250 characters  Who said this?  …………………………………………………………………………………………………………………...  Who do they work for?  …………………………………………………………………………………………………………………...  Upload logo: File should be min 400px x 400px, JPG or PNG and not more than 10MB |

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| Your Social Value in Media  Promote the news, articles or blog posts that your social value work has been featured in. This is a great opportunity for your stakeholders, partners or the general public to stay up to date with your latest news.  Name of piece: …………………………………………………………….............................................  Provider: …………………………………………………………….............................................  Description:  …………………………………………………………………………………………………………………...  ……………………………………………………………………………………………. 0/60 characters  Date Published: …………………………………………………………….........................................  Info Link: ……………………………………………………………..........................................  Upload image: ……………………………………………………………...........................................  You can add multiple examples of your social value in the media if you wish. |

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| How To Help  Let people know what kind of support your organisation needs.  Although your social enterprise 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**  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.  Choose the type of skilled volunteers from a drop down list  i: Examples: - Administrative, HR, Legal, Marketing, Mixed Skills  Description: (40 characters)  ……………………………………………………………………………………………………………………  **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.  Choose the type of products from a drop down list  i: Examples: - Clothing & Footwear, Free Tickets, Groceries & Toiletries, Medical, Transport  Description: (40 characters)  ……………………………………………………………………………………………………………………  **Services**  Choose the type of services from a drop down list  i: Examples: - Cleaning, Fundraising, Healthcare/Medical, Property/Venues  Description: (40 characters)  ……………………………………………………………………………………………………………………  **More Ways to Help:**  Describe and other ways to support your organisation:  …………………………………………………………………………………………………………………...  …………………………………………………………………………………………….……………………………  …………………………………………………………………………………………………………………………  ………………………………………………………………………………… 0/500 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.  Description of your Products: …………………………………………………………………………………………………………………….  …………………………………………………………………………………………………………………….  .……………………………………………………………………………………………………………………  Link option?: https:// …………………………………………………………………………………………….  Add an image?: File should preferably be 1920px x 1080px, JPG or PNG and not more than 10MB |

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| **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 where you can select Financials & Diligence to complete the next section.** |

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| Financials & Diligence  Financials  Link to your Companies House profile …………………………………………………….……….. i: Use this link to find your company details and copy paste your Companies House profile.  <https://www.gov.uk/get-information-about-a-company>  Key Figures  Please define your fiscal year:  Date starting: …...………………...…………………………………………………………………………….  Date finishing: …..………………...…………………………………………………………………………….  Annual turnover: £ ……..………...…………………………………………………………………………….  Please define your workforce:  Number of volunteers: ……...…...………………………………………………………………………….  Number of employees: ..………...………………………………………………………………………….  Key People:  Let us know who currently works at your organisation. There will be an option to include Linkedin profiles.  ……………………………………...………………………………………………………………………….  ……………………………………...………………………………………………………………………….  ……………………………………...………………………………………………………………………….  ……………………………………...………………………………………………………………………….  ……………………………………...………………………………………………………………………….  ……………………………………...………………………………………………………………………….  ……………………………………...………………………………………………………………………….  Annual Report  Please upload your annual report here: Max uploaded file size is 10MB  Other funding we have received (optional)  This is open source data provided by 360Giving. It shows grants that over 150 funding organisations have given. These organisations openly publish grants data to help improve charitable giving.  https:// ……………………………………………………………………………………………………….  If your social enterprise 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.  **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.** |

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| 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.  ………………………………………...…………………………………………………….............................  ………………………………………...…………………………………………………….............................  ………………………………………...…………………………………………………….............................  ………………………………………...…………………………………………………….............................  ………………………………………...…………………………………………………….............................  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? There will be a dropdown list.  ………………………………………...……………………………………………………...............................  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 monitor the quality of your work:  ………………………………………...……………………………………………………...............................  Is your project 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 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 to 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**