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 Unregistered Groups 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.**

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| **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. Make sure you use an email that you check regularly to receive notifications. |

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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, social enterprises and unregistered groups 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 |

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| 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. | 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. | **Unregistered Group**  **i: Recipient**  **As your organisation is unregistered, please make sure you include links to your websites, social media accounts and list the LinkedIn profiles of your team members. This is for transparency and legitimacy reasons.**  **Create Account** | |

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| **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. 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. |

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| **Create profile - core profile**  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.  **Organisation type:**  Unregistered Association  Community Group  Club  Small Charity  **Your logo**  We will ask you for your logo in one of the following formats:  File should be min 400px x 400px, JPG and not more than 10MB  **Key image**  File should preferably be 1920px x 1080px, JPG 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** (0/80 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. (0/350 characters)   |  | | --- | |  |   **Vision of the future**  Please describe your vision for the future. (0/350 characters)   |  | | --- | |  |   i: What is the future world your organisation wishes to build?  **Shops** [ ]  i: Number of 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 characters each):  1.   |  | | --- | |  |   2.   |  | | --- | |  |   3.   |  | | --- | |  |   4.   |  | | --- | |  |   5.   |  | | --- | |  |   i: Examples:  - People are lifted from poverty through employment and managing their mental health challenges. |

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| **Your cause and area of interest**  Choose one or multiple examples of the cause your organisation 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 | |

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| **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: (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. |

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| **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. |

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| **Financial performance**  **whatimpact** encourages transparent information for due-diligence and decision-making processes, saving time and establishing trust.  Comment on Financials  Please detail where your money comes from, how it's spent and any future plans to grow or change. (0/350 characters)   |  | | --- | |  | |

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| **Testimonials**  **Partner testimonial**  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  **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. 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.  Monetary donations: (Tick box option on online site)   |  | | --- | |  |   i: Examples:  - fundraising help  - one off donation  - legacy  **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: (Tick box option on online site)   |  | | --- | |  |   i: Examples:  - Marketing: helping to deliver a campaign, updating social media, delivering PR activities  **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 donations required: (Tick box option on online site)   |  | | --- | |  |   **Services**  Does your organisation need any service donations? Services could include: pro bono professional work (legal, web, business strategy, design etc), as well as free membership to your programme, a free licence to software.  Service donations required: (Tick box option on online site)   |  | | --- | |  |   **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. (0/350 characters)   |  | | --- | |  |   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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| **Diligence**  Information on your financial status encourages transparency and trust, leading to more successful collaborations.  **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  **Paste a link to your 360Giving profile**  https://  i: If your organisation 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 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 |
| **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 if 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 in order 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** (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:** £  **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. (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 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/xxxx  End date: xx/xx/xxxx  Ongoing: [ ]  **Your reporting periods on whatimpact:**  Quarterly: [ ]  Bi- Annually: [ ]  **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.  **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 characters  1. (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 characters  1. (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**