



## The Good Exchange

### User Guide for Applicant Organisations

A step-by-Step guide on how to register your charity, community interest company, community group or social enterprise for funding and fundraising through The Good Exchange's on-line matching platform.

Updated January 2022

## Contents

1. Introduction .....	2
2. Register your organisation and submit a project.....	2
Step i. Check that your organisation is eligible to use The Good Exchange for funding and fundraising .....	3
Step ii. Create a personal account .....	3
Step iii. Check if your organisation is already registered.....	5
Step iv. If not already registered, complete the Eligibility Quiz and register your organisation as an Applicant .....	5
Step v. Create and submit your project .....	7
3. Managing your Good Exchange Dashboard.....	9
4. Managing an Approved (Live) Project.....	10
5. Accepting Funding Offers.....	12
6. Completing Monitoring & Evaluation Reports.....	14
7. How your project is displayed to the public .....	15
8. Publicising Your Project.....	17
9. I need additional help or support .....	19

## 1. Introduction

The Good Exchange platform is owned and managed by Newbury-based charity [Greenham Trust](#). If you represent a UK registered charity, community or voluntary organisation, school or other eligible group seeking to fund a local project in The Good Exchange platform's area of operation (within a 20 mile radius of Market Place, Newbury, Berkshire) you can apply for funding from **several sources and crowdfund** for your organisation via the platform through **one single application**:

Once your organisation and fundraising project are live on The Good Exchange, the project can automatically match with eligible funding schemes. Funders can then shortlist your project and make a grant and/or match funding offer.

In addition, your project can receive donations from individuals, commercial companies and other organisations/groups as well as money received through fundraising collections and fundraisers can undertake events/challenges on behalf of your project to raise even more money.

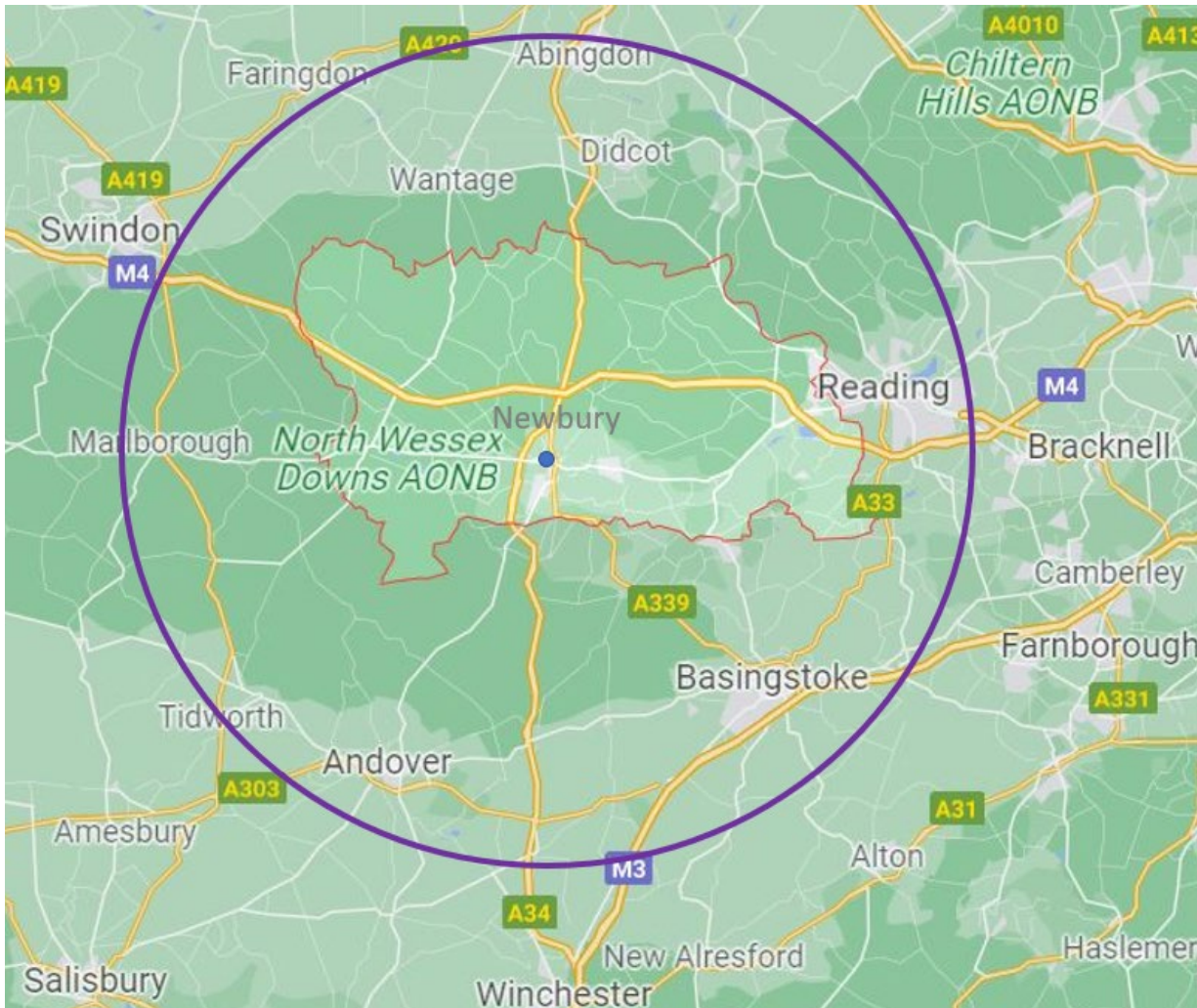
## 2. Register your organisation and submit a project

When setting up on The Good Exchange, you will work through five steps:

- Step i. Check that your organisation is eligible to use The Good Exchange for funding and fundraising
- Step ii. Create a personal account
- Step iii. Check if your organisation is already registered
- Step iv. If not already registered, complete the online Eligibility Quiz and Register your Organisation as an applicant
- Step v. Create and submit your project.

## Step i. Check that your organisation is eligible to use The Good Exchange for funding and fundraising

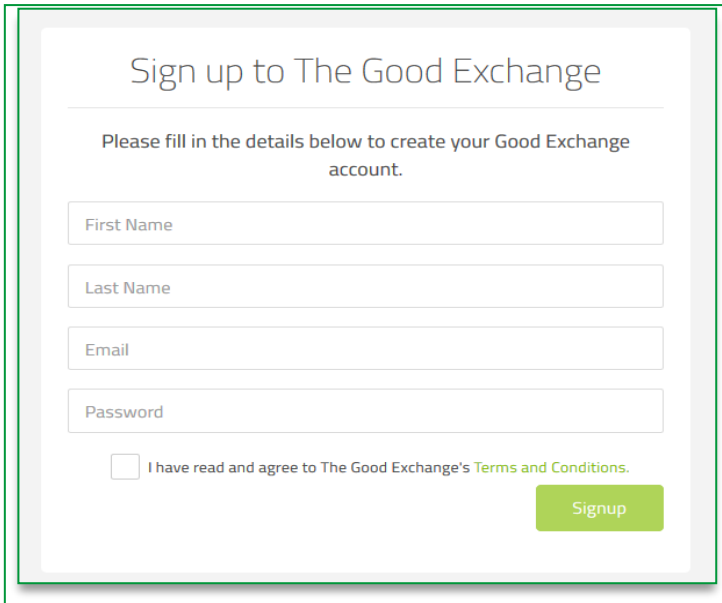
In order to register on The Good Exchange, the beneficiaries of your organisation and fundraising project must be within a 20 mile radius of Market Place, Newbury, Berkshire.



## Step ii. Create a personal account

To get started, click [Log-in](#) and then [Create Account](#). This will be your unique personal account that will allow you to manage an applicant organisation, as well as become a fundraiser or donate to your favourite projects.





Sign up to The Good Exchange

Please fill in the details below to create your Good Exchange account.

First Name

Last Name

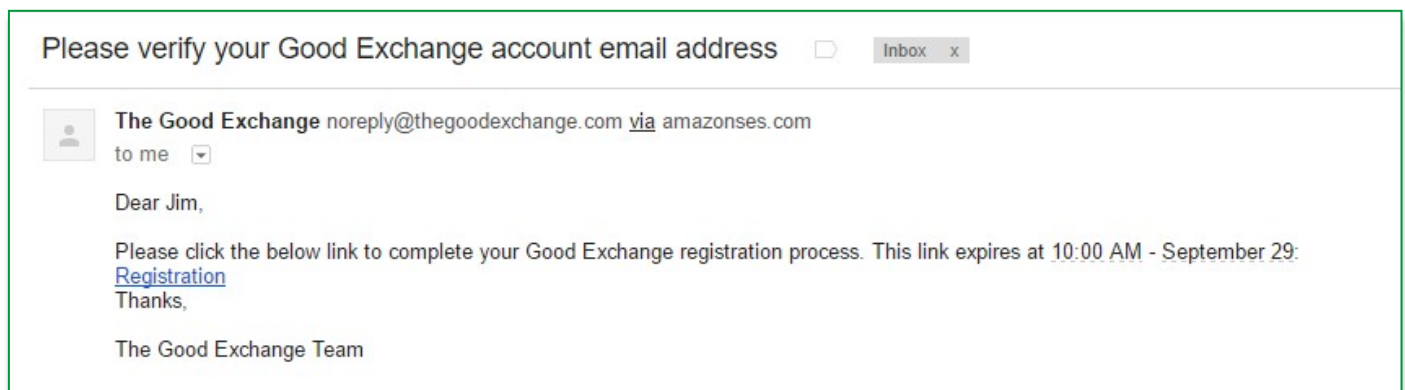
Email

Password

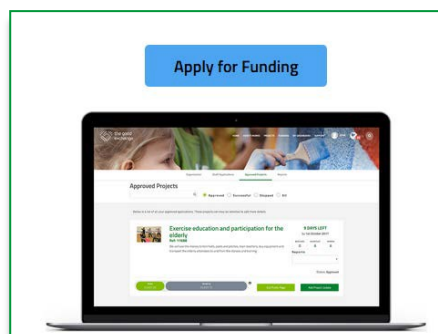
☐ I have read and agree to The Good Exchange's [Terms and Conditions](#).

Signup

Complete the details, read the Terms & Conditions and tick to confirm. You will then be sent an email to verify your email address.

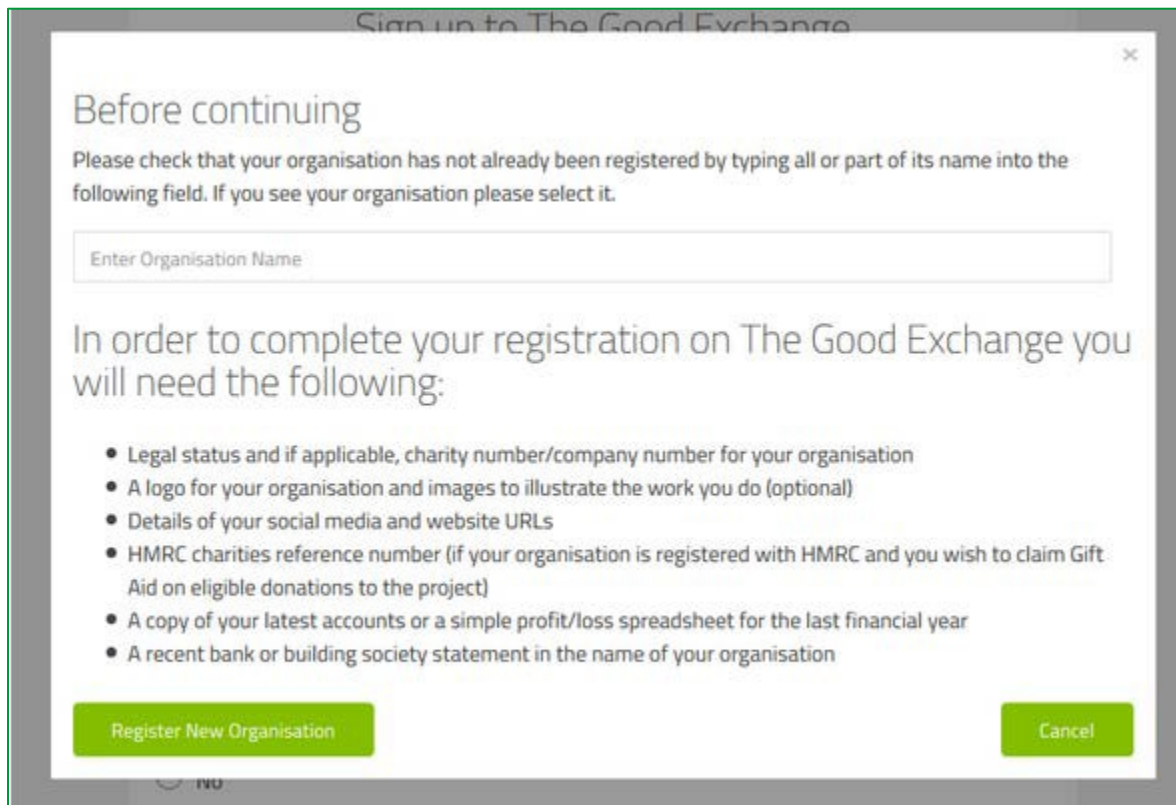


Follow the instructions in the email to come back through to The Good Exchange. **Log in**, select the **Apply for Funding tab**, and select the **Apply for Funding** button.



## Step iii. Check if your organisation is already registered

You will next be prompted to check if your organisation is already registered with The Good Exchange. Add your organisation's name in the box provided.



If your organisation shows in the listing, it is already registered. Please contact the current administrator for The Good Exchange within your organisation and ask them to add you as a new user under **My Dashboard > Organisation**. If you do not know who the current admin user is or if they no longer at your organisation, please send an email to:

[support@thegoodexchange.com](mailto:support@thegoodexchange.com) for assistance.

If your organisation does not show in the dropdown listing, then it is not yet registered. You can now click **Register New Organisation** and complete the Eligibility Quiz.

## Step iv. If not already registered, complete the Eligibility Quiz and register your organisation as an Applicant

The short eligibility quiz will determine whether your organisation is eligible to become an applicant on The Good Exchange. Complete the online multiple choice questions.

If you can answer 'YES' to questions 1, 2, 3 and 7 and NO to questions 4, 5 and 6 then your charitable organisation is eligible to use The Good Exchange.

**Question 1** – Are you fundraising as part of an organisation rather than as an individual? (YES)

**Question 2** – Is your organisation a Charity or Not-for-Profit organisation? (YES)

**Question 3** – Do you operate in the UK? (YES)

**Question 4** – Are you a political party raising funds for a political cause? (NO)

**Question 5** – Are you raising funds to promote religion? Note: All community related projects from religious organisations are welcome (NO)

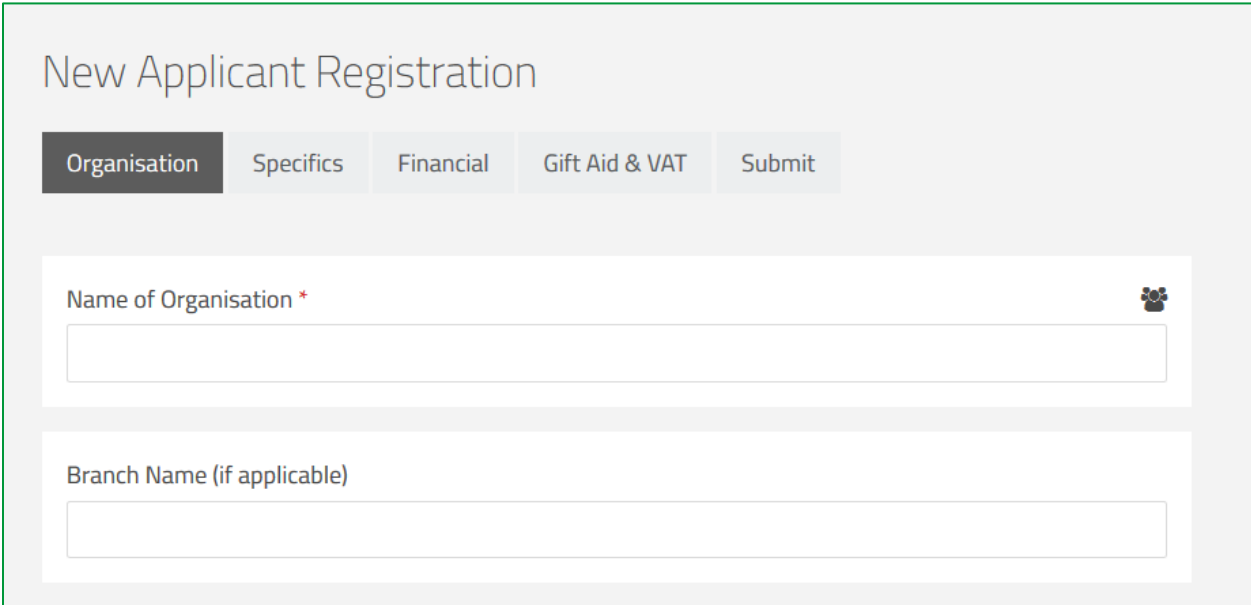
**Question 6** – Are your beneficiaries solely outside of the UK? (NO)

**Question 7** - Are the beneficiaries of your charitable organisation and fundraising project within a 20 mile radius of Market Place, Newbury, Berkshire? (YES)

Q7 Yes – Grant funders provide grants through The Good Exchange in these areas and your project may be matched with one or more funders for a grant or match fund. You can also use the platform to crowdfund to attract public donations and fundraisers to support your charitable fundraising project.

Q7 No- Charities or community groups project beneficiaries wholly outside this area are not eligible to use The Good Exchange.

If your organisation is eligible, you can now begin registering it as an Applicant on The Good Exchange. The **Applicant Registration Form** is made up of four sections, each of which requires completion in full prior to being verified.



The screenshot shows the 'New Applicant Registration' form. At the top, there is a title 'New Applicant Registration'. Below the title is a horizontal navigation bar with five tabs: 'Organisation' (which is highlighted in dark grey), 'Specifics', 'Financial', 'Gift Aid & VAT', and 'Submit'. The main content area contains two input fields. The first field is labeled 'Name of Organisation \*' and has a small icon of three people to its right. Below this label is a text input box. The second field is labeled 'Branch Name (if applicable)' and also has a text input box below it.

- **Organisation:** General organisation details.
- **Specifics:** Further details including beneficiaries, charitable categories and geographical locations.
- **Financial:** Financial details, including an upload of latest annual accounts (or a balance sheet), bank/building society details and an upload of your latest bank/building society statement (showing account name, number and sort code).
- ❓ **Gift Aid & VAT:** Your current Charity Reference Number and details about whether your organisation is registered for Gift Aid and VAT. Follow this link for more information on how Gift Aid works on The Good Exchange: <https://thegoodexchange.com/help-support/#claim-gift-aid>

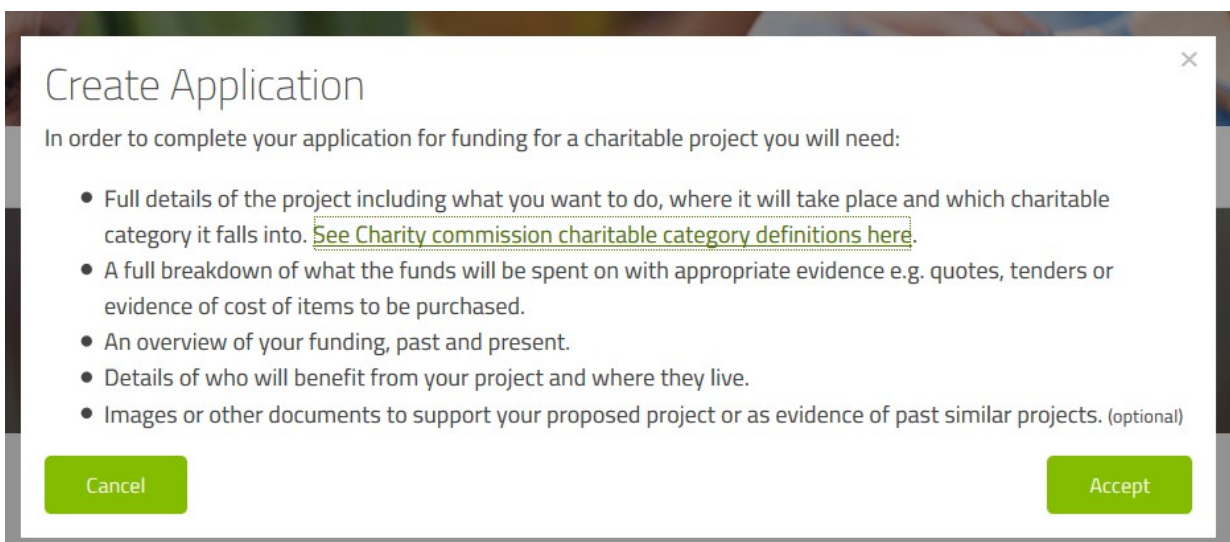
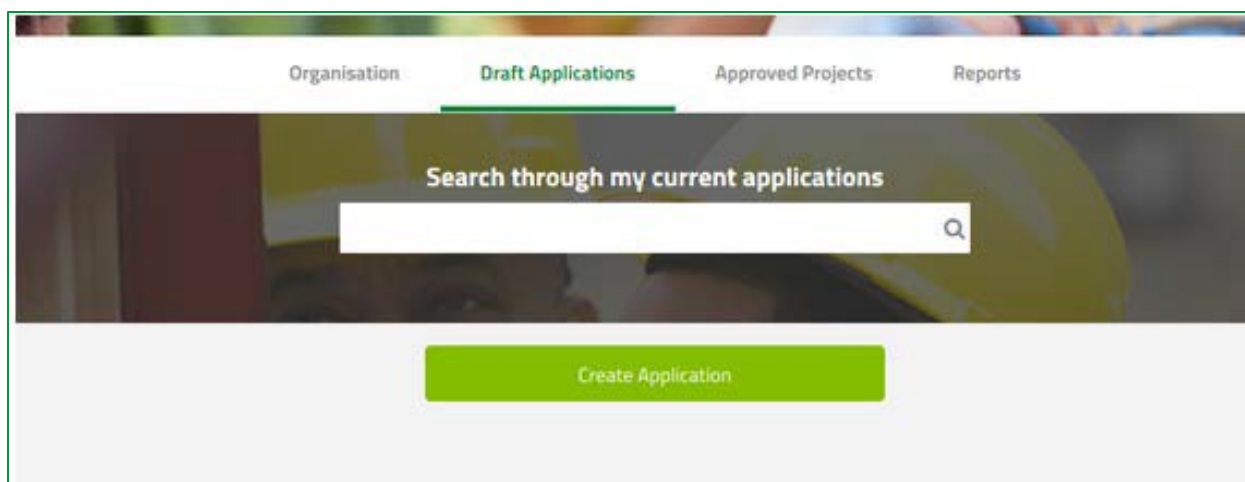
Click **Save & Next** as you move through each section and then **Submit** at the end. If you have any questions about the information we request here, contact: [support@thegoodexchange.com](mailto:support@thegoodexchange.com).

## Step v. Create and submit your project

Once you have registered your organisation you will be able to create a project to attract funding.

**\*Please Note\*** You do not have to finish entering your organisation details before you can begin a project - just click 'Save for Later' and then start on your project. However, your project will not be approved to go live on the platform until all organisation details are added and approved.

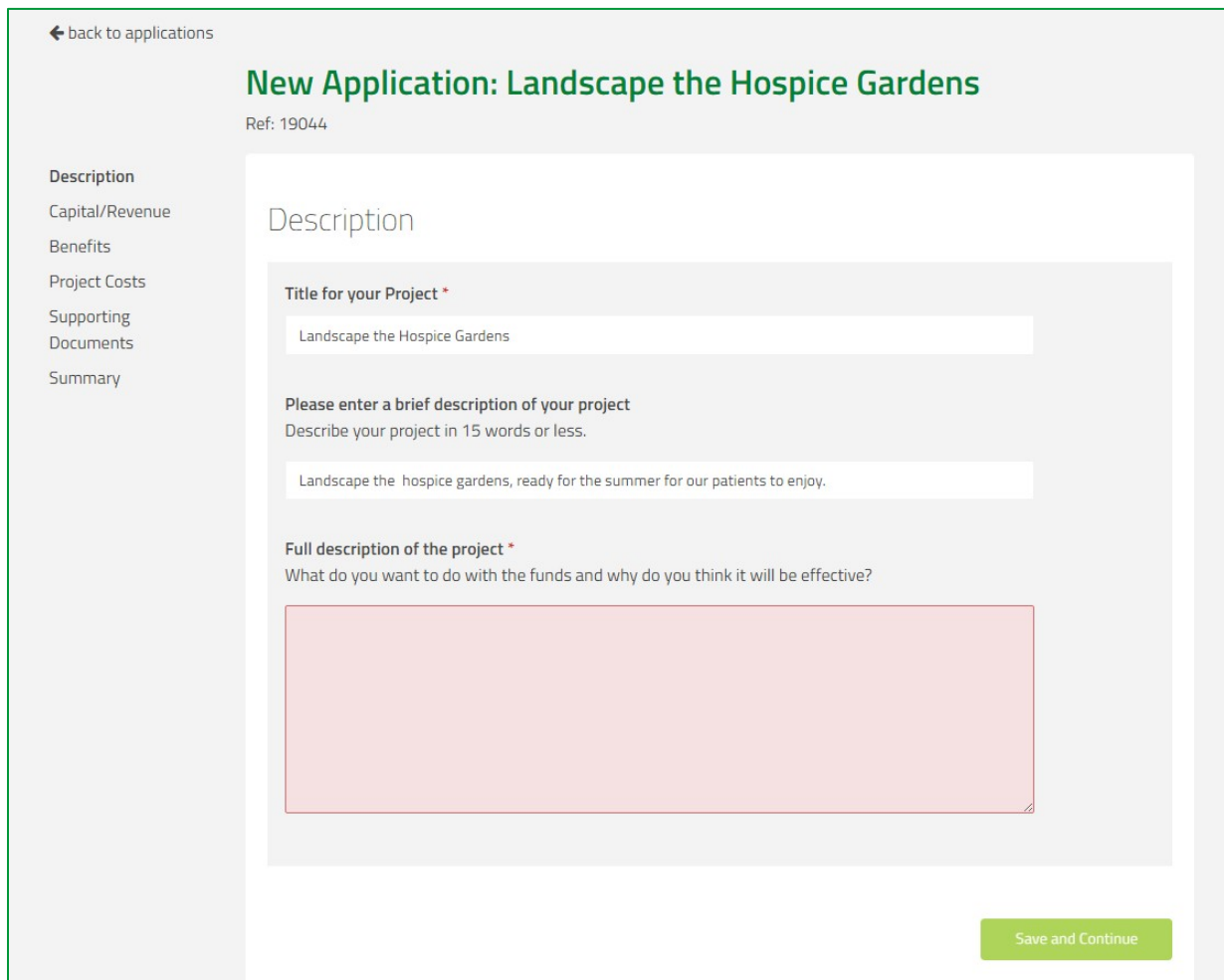
Start creating your project under **My Dashboard > Draft Applications > Create Application**.





When you have read the information, click **Accept** and you will be directed to the **Draft Project Form**.

This form is made up of six sections, each of which requires completion in full prior to approval to going live on The Good Exchange.



← back to applications

## New Application: Landscape the Hospice Gardens

Ref: 19044

**Description**

Capital/Revenue

Benefits

Project Costs

Supporting Documents

Summary

**Description**

**Title for your Project \***

Landscape the Hospice Gardens

**Please enter a brief description of your project**  
Describe your project in 15 words or less.

Landscape the hospice gardens, ready for the summer for our patients to enjoy.

**Full description of the project \***  
What do you want to do with the funds and why do you think it will be effective?

Save and Continue

- **Description:** Add a title for your project and a brief and detailed description
- **Type of Project: Capital/Revenue:** Select which type of project you are raising funds for, whether this is Capital (eg; building new premises; purchasing equipment), Revenue (e.g.: utilities; staff salaries) or mixed Capital and Revenue
- **Benefits:** Provide details of beneficiaries, geographical locations, charitable categories and impact
- **Project Costs:** Add a breakdown of all the individual costs for your project, an overall project cost and whether you have already raised some funds towards it. You must also provide documentary evidence of each of the exact costings in your breakdown. If you have more than one document you may add further items under Supporting Documents
- **Supporting Documents:** Add further documentary evidence and any other documents you wish to add to support your project
- **Summary:** A full summary of the project details you have entered so far.

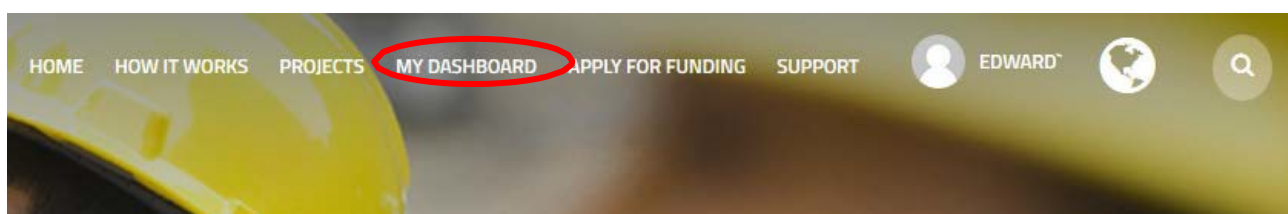
Click **Save & Next** as you move through each section and then **Submit** at the end (or click **Save for Later** if you would prefer to return to your project another time). If you have any questions about the information we request here, contact: [support@thegoodexchange.com](mailto:support@thegoodexchange.com)

Remember to answer all questions as accurately as possible as these questions will be used to match with eligible funding schemes. The more information you can provide, the higher the chance of matching with potential funders.

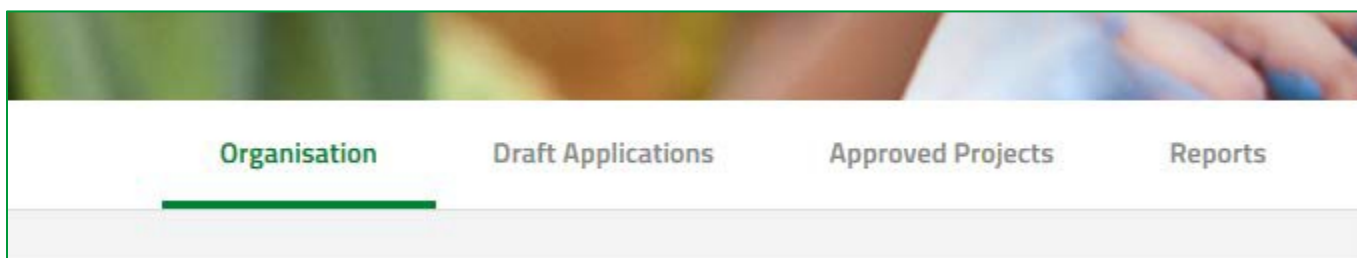
Once you have submitted your project, The Good Exchange team will review and approve it to go live on the platform. If any further information is needed, you will be contacted directly by email. Once your project is live, it can automatically match with one or more of the funders on the platform, depending on their individual matching criteria. From there, funders can shortlist your project for potential match funding and/or grants. Your project can also receive public donations as well as support from fundraisers. Please share out the individual link to your project page on social media to encourage your supporters to donate (see section: [Publicising Your Project](#)).

### 3. Managing your Good Exchange Dashboard

Your Good Exchange organisation details and your fundraising projects are managed from the **Dashboard Overview page**. To access this page, click on the **My Dashboard** link at the top of any page once you have logged in to your account.



#### Dashboard Overview page

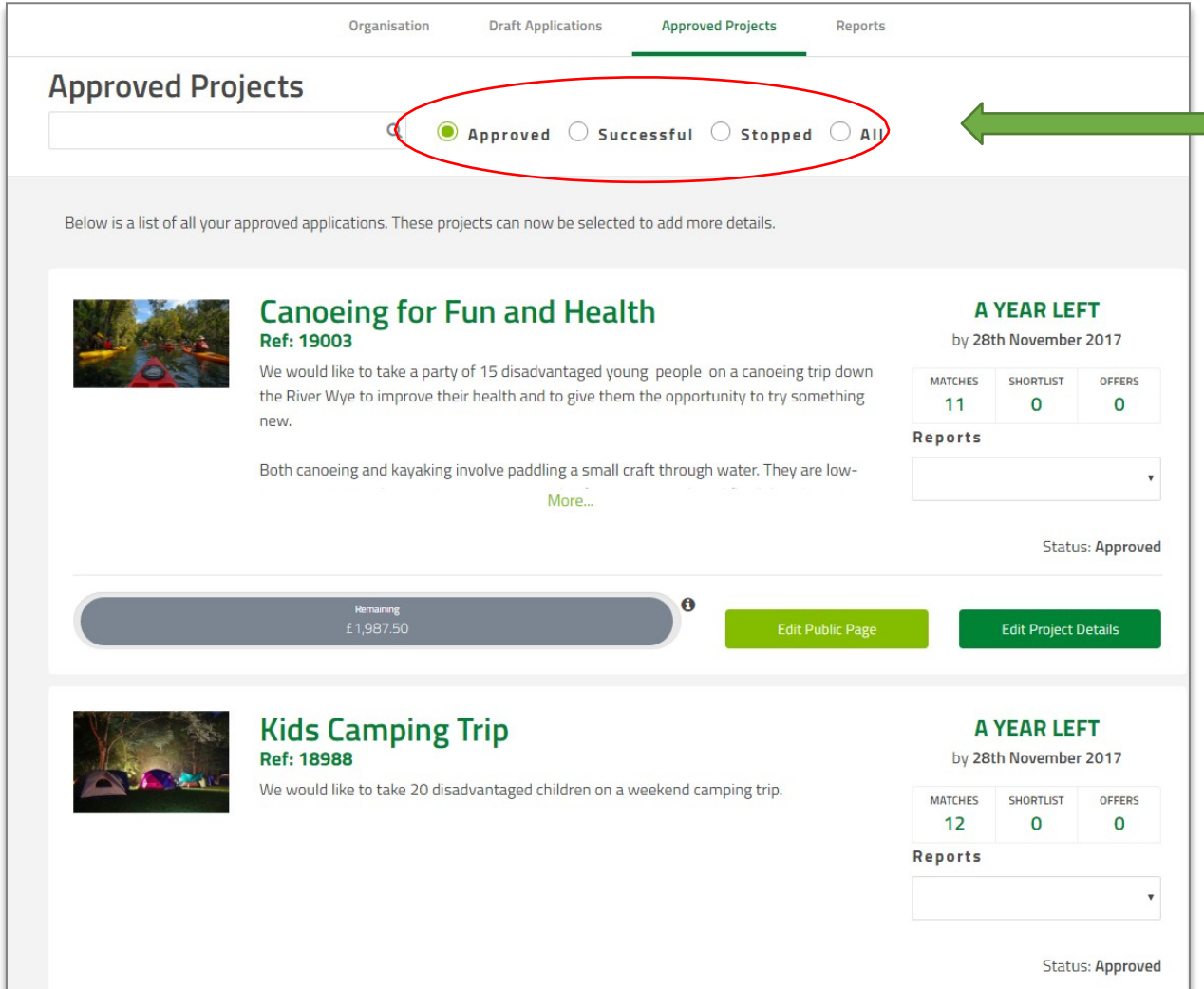


The **Dashboard Overview page** is divided into 4 'clickable' tabs:

- **Organisation** - Manage and edit your organisation's details, add organisation images and add/remove current users or assign roles (main administrator only). This section is completely separate from all of your projects and should be fully completed and kept up to date.
- **Draft Applications** – Start creating a new project or continue working on an existing draft project.
- **Approved Projects** – View and manage current live projects. From here you can also view projects which have become Successful/fully funded (see section: [The 'Approved Projects Tab'](#)).
- **Reports** - Access monthly statements which show the breakdown of recent payments to your bank/building society account as well as invoices.

## 4. Managing an Approved (Live) Project

Once approved, your project will be listed in the **Approved Projects** tab of your dashboard.




Organisation Draft Applications **Approved Projects** Reports

### Approved Projects

☒ Approved ☐ Successful ☐ Stopped ☐ All

Below is a list of all your approved applications. These projects can now be selected to add more details.



**Canoeing for Fun and Health**  
Ref: 19003

We would like to take a party of 15 disadvantaged young people on a canoeing trip down the River Wye to improve their health and to give them the opportunity to try something new.

Both canoeing and kayaking involve paddling a small craft through water. They are low-

[More...](#)

**A YEAR LEFT**  
by 28th November 2017


MATCHES	SHORTLIST	OFFERS
11	0	0

**Reports**

Status: Approved

Remaining £1,987.50

[Edit Public Page](#) [Edit Project Details](#)



**Kids Camping Trip**  
Ref: 18988

We would like to take 20 disadvantaged children on a weekend camping trip.

**A YEAR LEFT**  
by 28th November 2017

MATCHES	SHORTLIST	OFFERS
12	0	0

**Reports**

Status: Approved

You can click on the radio buttons to list projects according to their status: **Approved** (Live), **Successful** (fully funded / no longer fundraising), **Stopped** (project not going ahead) or **All**.

To the right of the project title, you will see the deadline date on which your project will be reviewed again by The Good Exchange if it has not yet reached its funding target. Below this there are three numbers:

- **Matches** – Shows the number of possible funding schemes your project has matched with (Note that this does not mean that the schemes are currently shortlisting or have funds available)
- **Shortlist** – Shows the number of funding shortlists on which your project has been placed.
- **Offers** – Shows the number of funding offers that your project has received.


A dropdown list of reports is also available:

- **Funding Report Master** – a record of all grants and donations towards the project in report form.
- **Application Summary** - A printable summary of your project.

To manage the details of your project, click on the **project title** or the **Edit Project Details** button to access the **Project Details Page**.

## Project Details Page

[Return to list of Projects](#)
[Request Edit](#)



### Exercise education and participation for the elderly

Ref: 11688  
by [Greenham Sports Club](#)

Deadline **1st October 2017**

Status: **Approved**

[Mark As Successful](#)

We will use the money to hire halls, pools and pitches, train teachers, buy equipment and transport the elderly attendees to and from the classes and training

Raised  
£2,421.25

Remaining  
£6,922.75

[Project](#)
[Application](#)
[Messages](#)
[Funds Raised](#)
[Funding Offers](#)
[Application History](#)
[Notes](#)
[Documents](#)
[Evaluation](#)

### Project Information

(At the time of applying)

Type of Application: Both Capital and Revenue

Total Cost of Project: £8,900.00

Amount Externally Raised: £1,500.00

Fees (incl. VAT): £444.00

Total Amount Sought on The Good Exchange: £7,844.00

Date Submitted: 4th July 2017

MATCHES	SHORTLIST	OFFERS
0	6	6

[View Public Page](#)

### Externally Raised

[Add](#)

The **Project Details Page** provides an overview of your project information. If you wish to mark a project as complete before it becomes fully funded, click 'Mark as Successful' on this page. If you wish to stop your project but it has not yet received any funding, please contact [support@thegoodexchange.com](mailto:support@thegoodexchange.com)



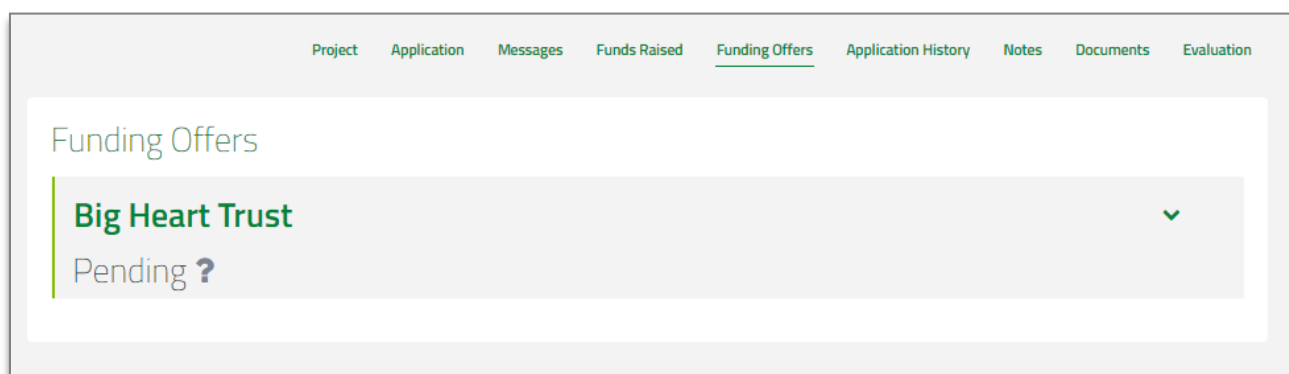
This page also displays nine titles:

- **Project** – Displays a summary of the financial information for the project. From here you can also **add any Externally Raised funds** (money raised towards this project from fundraising activities; collections and external donations/grants if not being added as a donation via the live project page).
- **Application** – Displays your completed application form.
- **Messages** – Allows you to communicate directly with funders and upload any further documents they request. Please note, the conversation must be instigated by the funder.
- **Funds Raised** – A read-only display of all donations, grants, match funding and Gift Aid that your project has received.
- **Funding Offers** – View funding offers which have been made and accept or decline the offers (see section: [Accepting Funding Offers](#))
- **Application History** – Displays information on project status changes and funding offer actions.
- **Notes** – A section where you may add notes about your project, only viewable by registered users within your organisation and not to funders or to the public.
- **Documents** - Displays all the documents uploaded within your project, as well as those sent or received via Messages.
- **Evaluation** – Complete Monitoring & Evaluation Reports for your project to inform supporting funders about the outcome of your project once it is marked as successful (see section: [Completing Monitoring & Evaluation Reports](#)).

## 5. Accepting Funding Offers

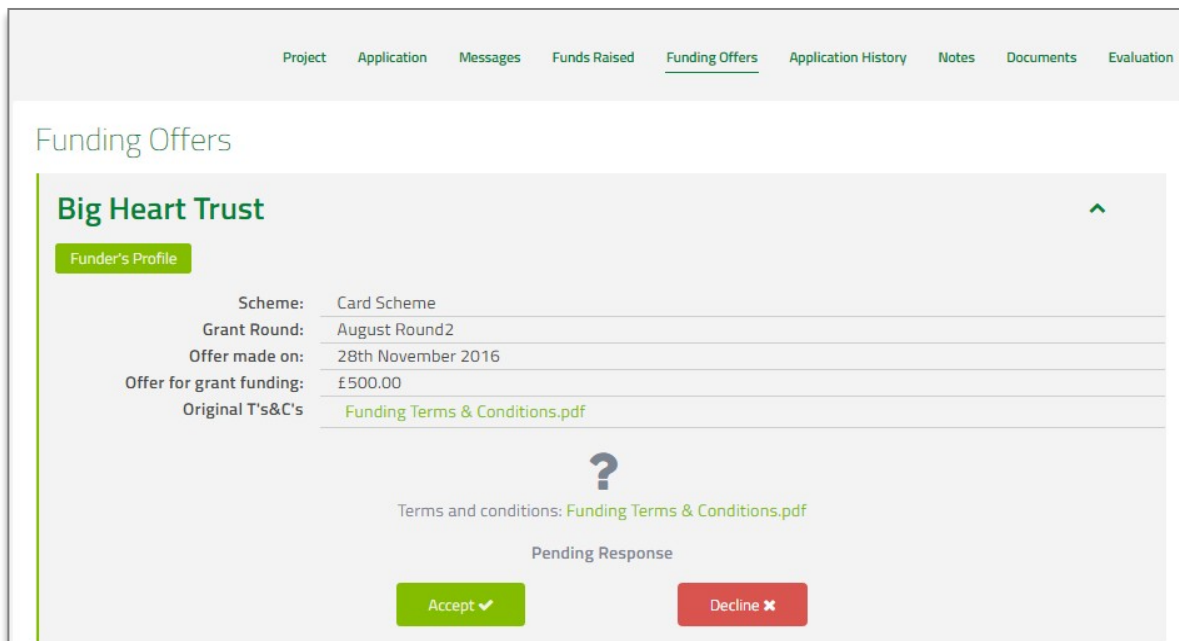
If a funder wishes to support your project by providing a match funding or grant offer, you will be notified by email (using the email address that you have used for your account on The Good Exchange). You should then follow the instructions in the email to log-in to The Good Exchange and accept the offer.

Once logged in, select [My Dashboard > Approved Projects > Select the project title > Funding Offers](#). You will then see the name of the funder with 'Pending' below.



Click on the dropdown arrow to the right of the funder name to view the details of the offer.

You now have two options: you can accept the offer or decline the offer



Project Application Messages Funds Raised **Funding Offers** Application History Notes Documents Evaluation

## Funding Offers

### Big Heart Trust

Funder's Profile

Scheme:	Card Scheme
Grant Round:	August Round2
Offer made on:	28th November 2016
Offer for grant funding:	£500.00
Original T's&C's	<a href="#">Funding Terms &amp; Conditions.pdf</a>

?

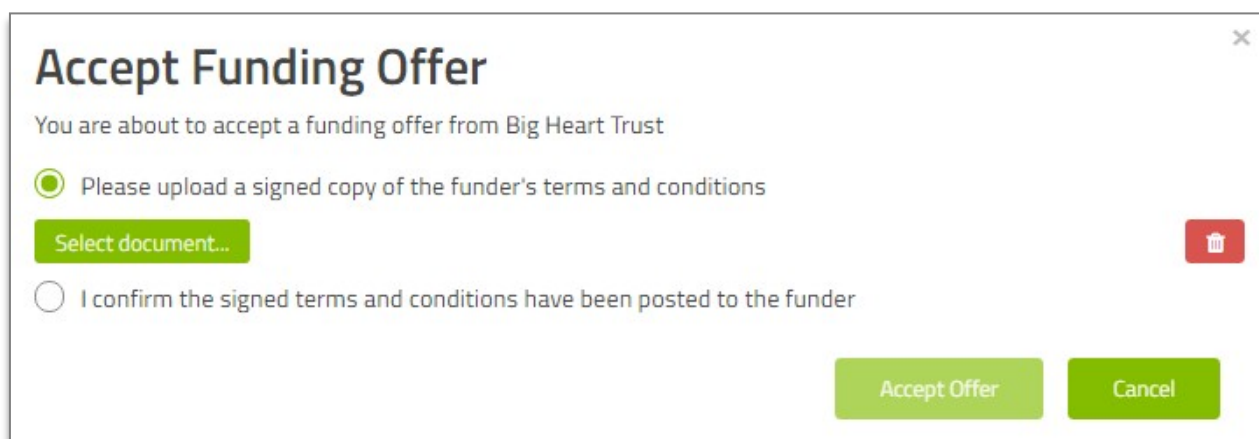
Terms and conditions: [Funding Terms & Conditions.pdf](#)

Pending Response

[Accept](#) [Decline](#)

### Accepting the Offer:

- First, download the funder's Terms & Conditions (T&Cs) by clicking on the green document name. You should then read them carefully and if asked, print and sign. Scan the signed T&Cs so that you may upload them back to The Good Exchange platform. If you do not have a scanner, you can scan via a mobile phone or post the signed T&Cs directly to the funder.
- Click 'Accept' on the offer and either upload the signed T&Cs or confirm that they will be sent by post to the funder.



## Accept Funding Offer

You are about to accept a funding offer from Big Heart Trust

☒ Please upload a signed copy of the funder's terms and conditions

[Select document...](#)

☐ I confirm the signed terms and conditions have been posted to the funder

[Accept Offer](#) [Cancel](#)

### Declining the Offer:

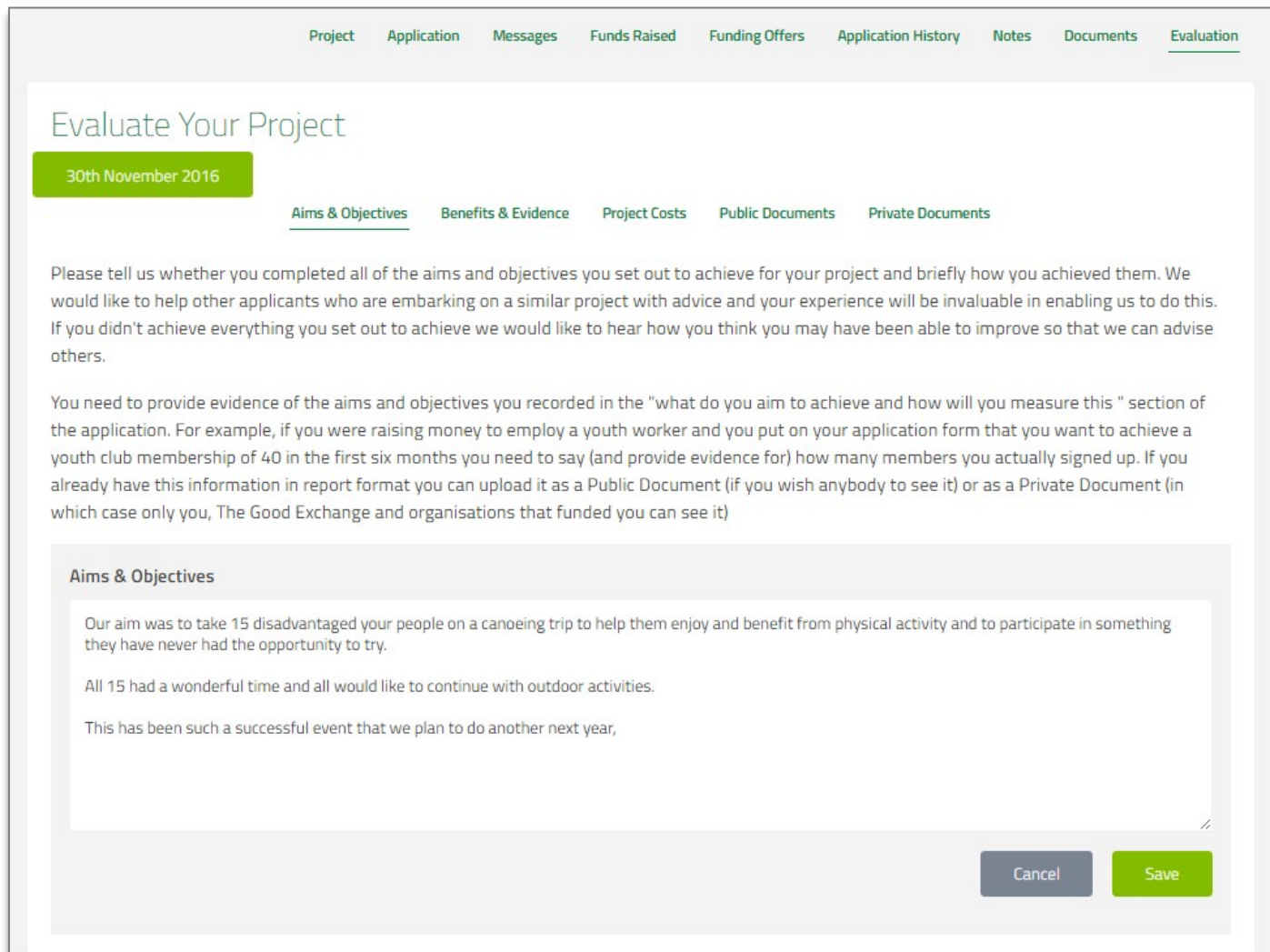
- Click 'Decline' on the offer. You will be asked to give a reason for your decision, and this will be sent to the funder.

If you have further questions about the funding offer itself, please contact the funder directly. The Good Exchange will not be able to provide clarification on information regarding specific funding offers as these are managed by the funder themselves.

## 6. Completing Monitoring & Evaluation Reports

Funders who support your project may require you to complete Monitoring & Evaluation Reports once your project has become successful / complete. In these reports, you can inform funders about the outcome of the project and how the money was spent. You can also provide evidence in the form of supporting documents. Completing your reports will also help to maximise your future projects' chance of funding.

Once logged in, select **My Dashboard > Approved Projects > Select the project title > Evaluation**. Click the deadline date for your reports.



The screenshot shows the 'Evaluate Your Project' interface. At the top, there is a navigation bar with links: Project, Application, Messages, Funds Raised, Funding Offers, Application History, Notes, Documents, and Evaluation (which is highlighted). Below this, the main heading is 'Evaluate Your Project' with a green box indicating the deadline: '30th November 2016'. Under the heading, there are five tabs: Aims & Objectives (selected), Benefits & Evidence, Project Costs, Public Documents, and Private Documents. The main text area contains instructions: 'Please tell us whether you completed all of the aims and objectives you set out to achieve for your project and briefly how you achieved them. We would like to help other applicants who are embarking on a similar project with advice and your experience will be invaluable in enabling us to do this. If you didn't achieve everything you set out to achieve we would like to hear how you think you may have been able to improve so that we can advise others.' It then explains that users need to provide evidence of the aims and objectives recorded in the application, using an example of raising money to employ a youth worker. Below this, there is a text input area for 'Aims & Objectives' with the following text: 'Our aim was to take 15 disadvantaged young people on a canoeing trip to help them enjoy and benefit from physical activity and to participate in something they have never had the opportunity to try. All 15 had a wonderful time and all would like to continue with outdoor activities. This has been such a successful event that we plan to do another next year,'. At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'.

You can then begin completing the information requested. Remember to click **Save** as you go. Only mark each section as complete once you are fully happy with what you have added. Ensure you answer all questions shown and upload all relevant documents at the end.


Once you have completely finished, click **Save as Complete** on **all** 5 sections and your reports will be passed to the funders who supported you by The Good Exchange team.

Your evaluation should be completed before the deadline (usually 3, 6 or 12 months after becoming successful, depending on the size of your project).

## 7. How your project is displayed to the public

You can also manage the public view of your project. To do this visit My Dashboard > Approved Projects > [Edit Public Page](#) to access the **Public Project Page**.


### Public Project Page



### Exercise education and participation for the elderly

Ref: 11688  
by [Greenham Sports Club](#)  
Location: Greenham (Ward)

**4 DAYS AGO**  
expires 1st October 2017

 funding matched

[Donate now](#)




[Become a Fundraiser](#)

We will use the money to hire halls, pools and pitches, train teachers, buy equipment and transport the elderly attendees to and from the classes and training

Raised  
£2,421.25

Remaining  
£6,922.75

Raised 25%  
Target £9,344



### Project Information

[+ Add Details](#)
[+ Add Photo](#)
[+ Add Video](#)

Additional Information +

Organisational Details +

We plan to add sports and fitness activities for the elderly

### Events

1 upcoming 2 taken place

[+ Add Event](#)

[Join Event](#) [Edit Event](#) [Delete Event](#)

### 2nd fundraising event


1 fundraiser joined this event

**Start**  
17th Oct 2017 - 5:00 pm

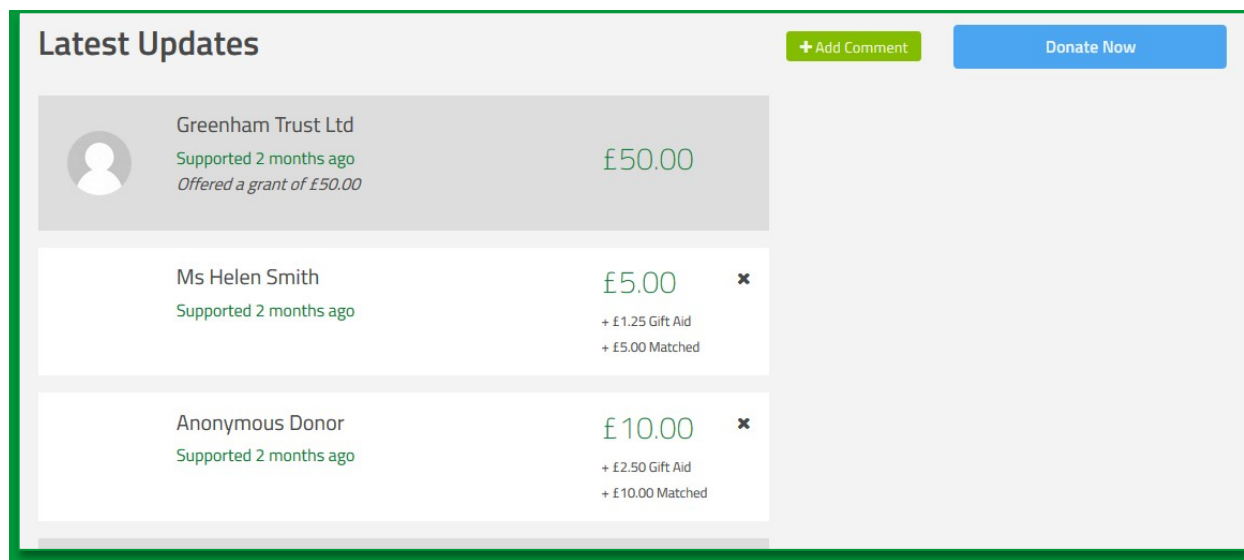
**End**  
18th Oct 2017 - 6:30 pm

**Details**  
I will be cycling to Paris to raise money for this project.

**Address**  
sdf  
daf  
dsfa  
dfa  
rg345yt







The **Public Project Page** provides an overview of what your project looks like to the general public.

There are a range of functions on this page that you can use to increase the appeal of the project and communicate with visitors/donors:

- **Image icon (top left)** – Increase the visual appeal of your project by adding a main image. This image will display on the main project page and in the search results to potential supporters.
- **Add images** – Increase the visual appeal of your project by adding further images to your project page.
- **Add videos** – Attract supporters with a story by adding You Tube videos about your project or organisation.
- **Add project details** – Add extra detail to give visitors to your project page further information or let them know how the project is going with an update.
- **Add comment** – Add a comment which will be displayed in the Latest Updates area, for example you may wish to thank one or more donors for their support.
- **Add event** – Add the details of any fundraising events you are holding in support of your project; eg; coffee morning, raffle, dinner, sports event. If a public fundraiser wishes to take part in your event to support you, they will be able to click 'Join Event' and fundraise on your project's behalf.

You can find out more about how you can use your project's public page to maximise its exposure in the **Publicising my Project** section of this guide.

## 8. Publicising Your Project

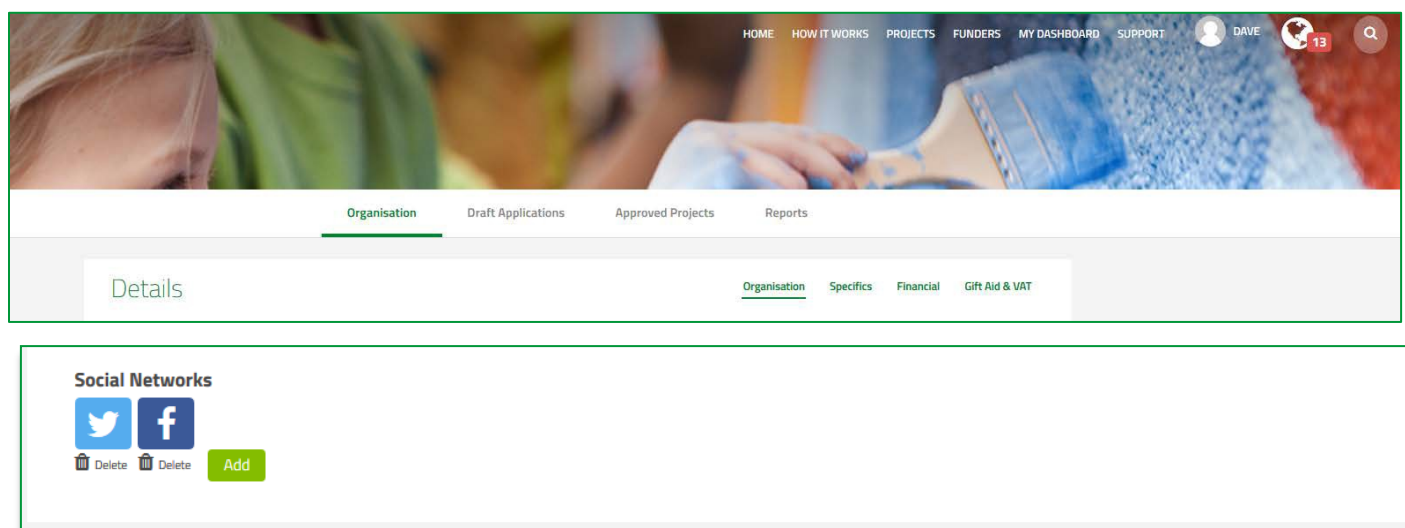
As well as updating your Public Project Page to add as much visual appeal as possible, you can spread the word about your project to attract more donations.

Your project page has an individual link – you can copy or paste this link and share on emails, newsletters, websites or on your social media platforms to encourage people to donate. If you have a match funding offer in place from a funder, tell the public about this when you share your project with them as this could mean their donation will be doubled!

### Sharing Your Project on Social Media


Sharing your project on your organisation's social media pages (such as Facebook, Twitter or Instagram) is a great way to attract donations. If you do not yet have social media pages but would like to set some up, please visit the **'Resources' page** on our website here: <https://thegoodexchange.com/resource-type/videos/> to access lots of training information, demonstrations and tips.

In the first instance, if you do have social media pages for your organisation, ensure you have added links to your pages under **My Dashboard > Organisation**.



This will allow the public to find your organisation's social media pages should they visit your Organisation Profile Page or your Project Page on The Good Exchange.



## Organisation Page




### Greenham Sports Club

We were set up in 2010 to promote sport in Greenham, especially to elderly people who have been referred to us for an exercise programme


Website: <http://www.gsc.org>



Additional Information +

#### Our Gallery



## Project Page



### Exercise education and participation for the elderly

Ref: 11688

by [Greenham Sports Club](#)

Location: Greenham (Ward)

9 DAYS AGO

expires 1st October 2017

 funding  
 matched

Donate now

Become a Fundraiser

We will use the money to hire halls, pools and pitches, train teachers, buy equipment and transport the elderly attendees to and from the classes and training


Raised  
£2,421.25

Remaining  
£6,922.75

Raised 25%

Target £9,344


Your project page also has a social media '**Share**' icon. Clicking on this will allow both you and the public to share your organisation profile on Facebook, Twitter, Google Plus or Linked In (or if you prefer you can copy/paste the project page link into a new Facebook or Twitter post).



## Exercise education and participation for the elderly

Ref: 11688  
by [Greenham Sports Club](#)  
Location: Greenham (Ward)

**9 DAYS AGO**  
expires 1st October 2017

 funding matched

[Donate now](#)

[Become a Fundraiser](#)

We will use the money to hire halls, pools and pitches, train teachers, buy equipment and transport the elderly attendees to and from the classes and training




Raised

£2,421.25

Remaining

£6,922.75

Raised 25%  
Target £9,344

### Project Information

[Additional Information +](#)

[Organisational Details +](#)

If you have a match funding offer in place on your project, don't forget to let everyone know in your post as this can be a great incentive to encourage your followers to support you by donating or fundraising.

## 9. I need additional help or support

To access additional resources for registration and/or creating and managing your organisation and project pages on The Good Exchange you can:

1. Visit our Help and Support Page here: <https://thegoodexchange.com/help-support/>
2. Contact our support team by emailing [support@thegoodexchange.com](mailto:support@thegoodexchange.com)
3. Raise a support request via our website here: <https://thegoodexchange.com/help-support/raise-a-ticket/>