

Surrey County Council Marketplace Guidance

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The Marketplace

Connecting, Enabling and Empowering our Communities

Introduction

Welcome to the Surrey County Council (SCC) Marketplace. The Marketplace is co-designed by public, private and social sector organisations that are based in or deliver services within the county. This guide has been developed to outline how you can use the Marketplace to support our local communities.

Our Vision

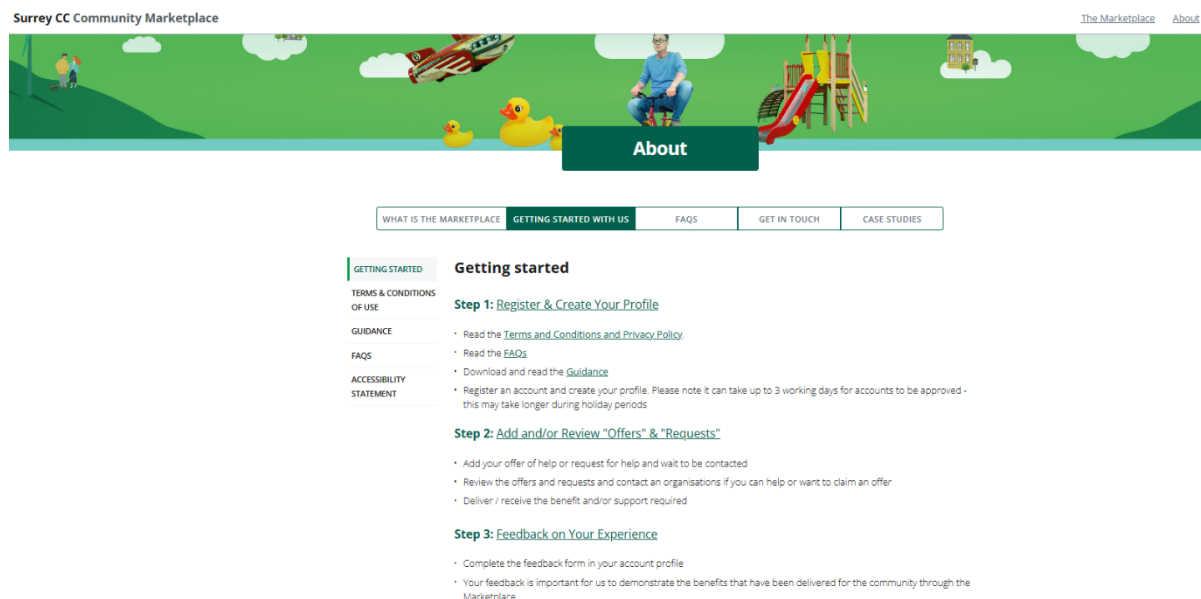
Our vision is for the public, private and social sectors in Surrey to work together so we can combine our efforts and resources and collectively use these to improve the social, economic and environmental wellbeing of our residents and local communities.

Why was the Marketplace created?

The Marketplace was created to help us achieve our vision by:

1. Enabling the sharing of resources for the benefit of our residents and local communities
 - Organisations working in local communities can request support and resources based on the real needs of residents in a local area.
 - Organisations that want to help can understand what communities need, where they need it and when they need it.
2. Encouraging partnership working and collaboration across the public, private and social sectors
 - Organisations can create a profile and provide information about the services they provide.
 - Organisations can connect, communicate with and support each other if they are working towards a common social, economic or environmental outcome.
3. Securing additional value from public sector spending through the Public Services (Social Value) Act 2012.
 - Suppliers can use the Marketplace to identify local need that is within their capacity and capability to deliver.

1. The “About” Page



1.1. Click “**What is the Marketplace**” to learn about **Our Vision**

1.2. Click “**Getting started with us**” to:

- Create and register an account
- Read the Terms and Conditions
- Read the Privacy Policy
- Read the guidance and FAQs

1.3. Click “**FAQs**” to get answers to frequently asked questions.

1.4. Click “**Get in Touch**” to access the “**Contact Us**” form to send a message to the Marketplace administrator.

If you need to **report a post or an organisation** you can:

- Use the “**Report Organisation**” link which can be found on each organisation’s profile
- Use the “**Report Post**” link which can be found on every offer or request

1.5. Click “**Case Studies**” to read examples of the benefits achieved through the Marketplace

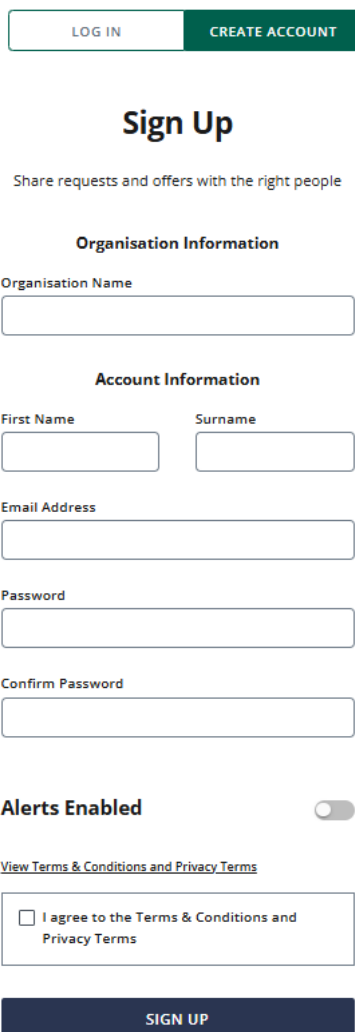
2. Register to use the Marketplace

2.1. To use the Marketplace, you must register your organisation. Before registering you must review the **Terms and Conditions** and **Privacy Policy**:

- a) Click “**About**” on the main task bar at the top of the page
- b) Click “**Getting Started with Us**”
- c) Click “**Terms and Conditions of Use**”

2.2. If you are willing to adhere to the terms and conditions of use, you can continue with the registration process.

- a) Click “**Sign In/Sign Up**” on the main task bar at the top of the page
- b) Click ‘**Create Account**’



The screenshot shows the 'Sign Up' registration form. At the top, there are two buttons: 'LOG IN' and 'CREATE ACCOUNT'. Below them is the 'Sign Up' heading and a subtext 'Share requests and offers with the right people'. The form is divided into two main sections: 'Organisation Information' and 'Account Information'. The 'Organisation Information' section has a single text input field for 'Organisation Name'. The 'Account Information' section includes four input fields: 'First Name', 'Surname', 'Email Address', and 'Password'. Below the 'Password' field is a 'Confirm Password' field. There is a toggle switch for 'Alerts Enabled' which is currently turned off. Below the toggle is a link 'View Terms & Conditions and Privacy Terms'. At the bottom of the form is a checkbox labeled 'I agree to the Terms & Conditions and Privacy Terms', which is currently unchecked. A dark blue 'SIGN UP' button is at the very bottom.

LOG IN CREATE ACCOUNT

Sign Up

Share requests and offers with the right people

Organisation Information

Organisation Name

Account Information

First Name Surname

Email Address

Password

Confirm Password

Alerts Enabled

[View Terms & Conditions and Privacy Terms](#)

☐ I agree to the Terms & Conditions and Privacy Terms

SIGN UP

2.3. Complete the registration form:

- a) Organisation Name (enter the correct and **full name**)

- b) Your first name and surname
- c) Organisation email address **or** your contact email if you are representing your organisation as the '**primary user**'. Please read and understand the responsibilities of the **primary user in section 2.4 below**.
 - If you are the primary user, the **email address** entered here will be how other **users from your organisation contact you**.
 - There can be multiple user accounts attached to the organisation profile. To avoid duplication only one profile should be set up for each organisation, however please contact the Marketplace administrator if you have a specific need here.
 - If someone in your organisation has set up an account, when you sign up and enter your organisation's name, you will receive a message stating that "**an organisation with that name already exists**" and given the option to join that organisation as a secondary user.

An organisation with that name already exists. If you continue to sign up with this, then you will join that organisation after your account has been approved.

- d) Create and confirm your **password** (use a password not known to any other individual)
- e) Enable **alerts**. Unless you switch on alerts you will not receive any notifications about new requests or offers posted on the Marketplace.
- f) Tick the box to confirm you **agree to the Terms and Conditions and Privacy Policy**
- g) Click **sign up**

2.4. To have a profile on the Marketplace an organisation must have a **primary user** who accepts overall responsibility for the offers posted or commitments to fulfil requests. '**Primary Users**' are also the individuals that set up the account for the organisation and can:

- a) Make changes to the organisations profile
- b) Make a request to the administrator to delete the organisation's account
- c) Add and respond to offers and/or requests
- d) Provide feedback
- e) Invite other team members from your organisation to join the Marketplace once your account has been approved
- f) Change the primary user to another team member
- g) Controls rights of other users in their organisation and enable them to:
 - add/edit posts on behalf of the organisation
 - edit the organisations profile

- add or edit other approved users
- 2.5. When you click “**Sign Up**” you will receive a confirmation email that your account has been created however **your account will need to be approved by the Marketplace administrator**. You will be notified by email when this has been completed. Please allow a **minimum of three working days** (this may take longer over holiday periods).

Log In

Your account has been created.
Your account will need to be approved
before you can login. You will be notified
by email when this is complete.

Email Address

Password [Forgot your password?](#)

LOG IN

- 2.6. When your account has been approved you will receive an email informing you that you can log in.

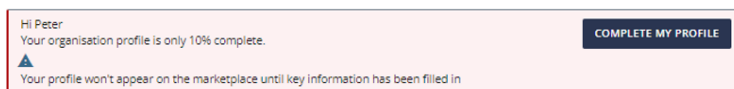
Hi Peter

Your account has been approved and you can now login.

- 2.7. Click “**Sign In**” at the top of the page on the main task bar and enter your email and password. You can reset your password at any time by clicking “**forgot your password?**”

3. Creating your Organisation Profile

- 3.1. When you log in for the first time you will see a prompt at the top of the page asking you to “**complete my profile**”. This is where you will need to enter information about your organisation before it will appear on the Marketplace.



- 3.2. To access / complete your organisation profile:

- a) Click the “**Complete My Profile**” button at the top of the page, or
- b) Click “**Account**” on the main task bar at the top of the page, then click “**Organisation Profile**”

- 3.3. Enter all of the **key information**.

A screenshot of a web application interface. At the top is a banner image showing a child on a bicycle and two yellow ducks. Below the banner is a dark green button labeled 'Account'. Underneath is a horizontal navigation bar with six tabs: 'POSTS', 'FEEDBACK', 'ORGANISATION PROFILE' (which is highlighted in dark green), 'USERS', 'NOTIFICATIONS', and 'ACCOUNT DETAILS'. Below the navigation bar is the 'Key Information' section. On the left, a note states: 'All information marked with an asterisk are required for validation and identifying your posts.' To the right of this note are several form fields: 'Organisation Name *' with the value 'Surrey County Council'; 'Email Address *' with the value 'social.value@surreycc.gov.uk'; 'Sector *' with a dropdown menu showing 'Other'; 'Type *' with a dropdown menu showing 'Public'; 'Organisation Size *' with a dropdown menu showing '501+'; 'Organisation Registration Number (if applicable)' with an empty text box; 'Organisation Address' section containing 'Street Number & Name *' with the value 'Woodhatch Place, 11 Cockshot Hill'.


- 3.4. Complete the “**General Information**” section. This information will be visible to others on your organisation profile page (under the “**Organisations**” tab) and at the bottom of your posts. Completing this section will enable others to learn

more about your organisation and may influence whether or not other organisations choose to contact and/or work with you.

General Information

This information will appear at the bottom of your posts and on your organisation's public profile, helping others to understand who you are.

Logo




REMOVE

CHANGE

A logo 250x250px works best.

Header Image



REMOVE

CHANGE

A banner 1040x288px will work best.

Bio

Surrey County Council is the top tier local authority for the county of Surrey. Surrey is divided into 11 local districts and boroughs.

Leader of the Council: Cllr Tim Oliver
Chief Executive: Terence Herbert

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3.5. Complete the “**Contact Information**”. This information will also be visible to others on your organisation profile page (under the “Organisations” tab) and at the bottom of your posts.

Contact Information

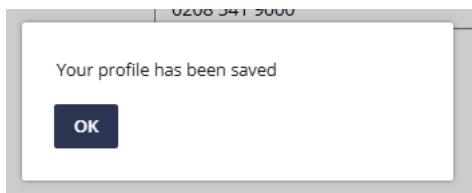
This information will appear at the bottom of your posts and on your organisation's public profile, giving others quick access to more information.

Website

Phone Number

SAVE PROFILE

3.6. When you have completed your profile information click “**Save Profile**” and you will receive confirmation that your profile has been saved.

A screenshot of a confirmation dialog box. It has a white background with a thin grey border. The text "Your profile has been saved" is centered in a dark grey font. Below the text is a dark blue button with the word "OK" in white capital letters.


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- 3.7. To view your organisation's profile page, click **"The Marketplace"** at the top right-hand corner of the screen, then click the **"Organisations"** tab. Search for your organisation then click **"View Profile"**. The information visible here to others is based on the fields you chose to complete above. You can update this information at any time.

[REQUESTS](#)
[OFFERS](#)
[ORGANISATIONS](#)
[ADD NEW POST](#)
[ADMIN 1](#)

Category: [ALL CATE...](#)
Sort By: [A - Z](#)


[Grid](#)
[Map](#)




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[VIEW PROFILE](#)
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21st Century AV Ltd

We deliver Audio Visual & Unified Communication Solutions that help businesses integrate and collaborate with next generation technologies. Integrating communications across networks is a

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24-7 Healthcare

24-7 Healthcare provide moving and handling products designed to compliment single-handed care where possible. Our product portfolio includes ceiling track hoist systems, standing and mobile hoists, c...

[VIEW PROFILE](#)
[CONTACT](#)

- 3.8. Once you have created your organisation profile, it is important you enable and **alerts**. You will not receive any notifications of any activity (requests or offers posted) on the Marketplace until this has been enabled. Click **"Account"** then click **"Notifications"**.

Alerts Enabled



What would you like to know about?*

Type

- ☒ Requests
- ☒ Offers

Category

- ☒ Volunteering
- ☒ Space
- ☒ Equipment
- ☒ Skills & Knowledge
- ☒ Educational
- ☒ Other

*Please ensure to tick both a type and a category to enable alerts.

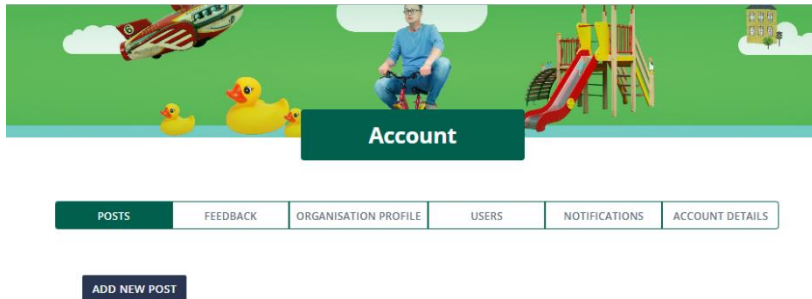
When would you like to receive alerts?

Frequency

- ☒ Individually As Posts Are Added
- ☐ As A Daily Bundle
(Daily bundles are sent out at 12:00pm every day)
- ☐ As A Weekly Bundle
(Weekly bundles are sent out at 12:00pm every Monday)

4. The “Account” Section

This section is only visible to you and other users in your organisation.

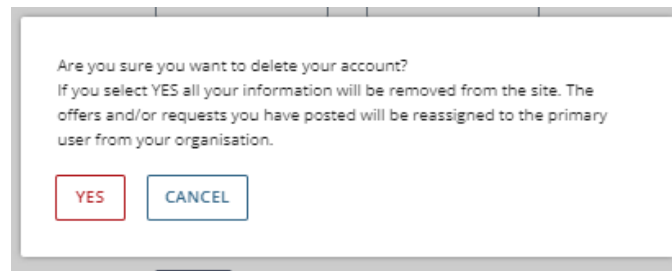


- 4.1. In the “**Posts**” section you will see a list of all the posts made by your organisation including those that have expired
- Posts marked “**R**” are the requests your organisation has made
 - Posts marked “**O**” are the offers your organisation has made
 - In the “**Posts**” section you can
 - “**Modify**” your posts if you need to change the details
 - “**Archive**” your posts if the timeframe for your request / offer has ended
 - “**Preview**” your post to see the information that will be visible to other users
- 4.2. In the “**Feedback**” section you can view
- Feedback to you need to write
 - Past feedback you’ve written
 - Feedback you have received
- 4.3. In the “**Organisation Profile**” section you will see your organisation information that is on the Marketplace. See “**4. Creating your organisations profile**” above for guidance.
- 4.4. In the “**Users**” section is a list of users attached to your organisations profile. For information on ‘**Primary Users**’ see section 2.4.
- 4.5. Click the “**Notifications**” tab to select
- What you would like to receive notifications about – **requests** and/or **offers**, and the **category** e.g. volunteering. Please note you will need to select **all categories** if you want to receive notifications about everything.
 - The **frequency** that you want to receive notifications

- Unless you switch on alerts you will not receive any notifications about new requests or offers posted on the Marketplace.

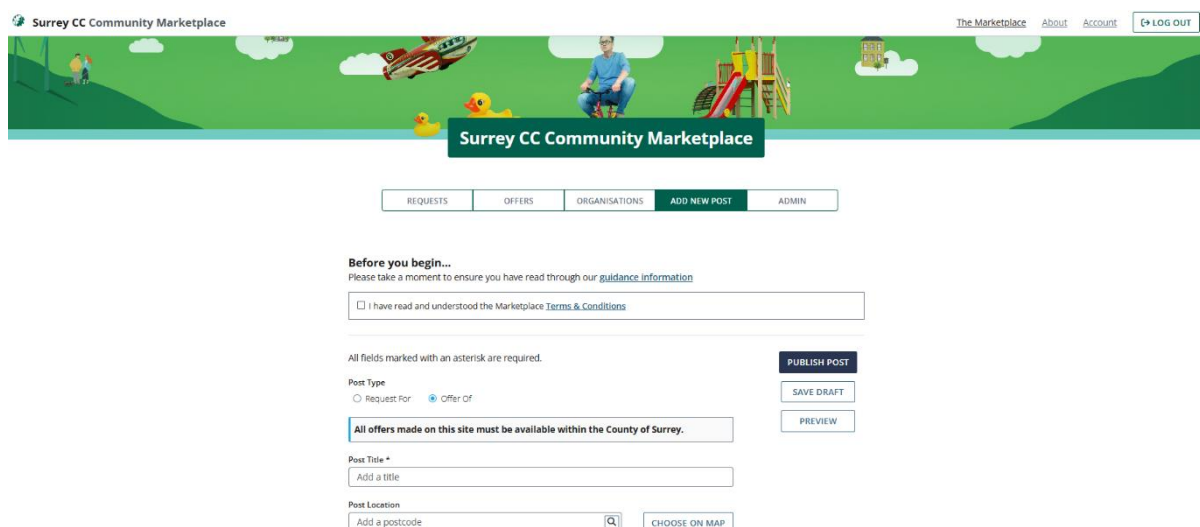
4.6. Click the “**Account Details**” tab to:

- View or change your contact details
- Change your password
- Delete your account:
 - a) If you are a **secondary user**, you can delete your account by clicking “**Delete Account**”.
 - b) If you are the **primary user**; you can either:
 - **Transfer the ownership** of the organisation’s account to a secondary user so they become the primary user, and then delete your personal contact details/account.
 - **Delete** the organisation’s account



5. Posting an Offer of Help and/or Post a Request for Help

5.1. You must be logged into your account to create a post. Click “**Add New Post**”



The screenshot shows the 'Surrey CC Community Marketplace' website. At the top, there is a navigation bar with links for 'The Marketplace', 'About', 'Account', and a 'LOG OUT' button. Below the navigation bar is a banner image featuring a person sitting on a bicycle, a yellow duck, and a red airplane. The main heading is 'Surrey CC Community Marketplace'. Below this is a row of buttons: 'REQUESTS', 'OFFERS', 'ORGANISATIONS', 'ADD NEW POST' (highlighted in green), and 'ADMIN'. The 'ADD NEW POST' form is displayed below the buttons. It starts with a section titled 'Before you begin...' which includes a link to 'guidance information' and a checkbox for 'I have read and understood the Marketplace Terms & Conditions'. Below this is a note: 'All fields marked with an asterisk are required.' The 'Post Type' section has two radio buttons: 'Request For' and 'Offer Of' (selected). To the right of these are three buttons: 'PUBLISH POST', 'SAVE DRAFT', and 'PREVIEW'. Below the 'Post Type' section is a text box for 'Post Title *' with the placeholder 'Add a title'. Below that is a 'Post Location' section with a text box for 'Add a postcode' and a 'CHOOSE ON MAP' button.

- 5.2. You must ensure you have read the “**Terms and Conditions**” and “**Privacy Policy**” before you add a new post as you will be required to confirm this before your post can be submitted for approval.
- 5.3. You can choose to post an offer or request, but you cannot offer help and request help in the same post.
- 5.4. In the “**Post Title**” section you should enter the type of support you are requesting or the type of help you are offering. The clearer you are the easier it will be for other organisations to understand what you are requesting or offering, for example volunteers, office space, equipment, skills and knowledge.
- 5.5. When entering the location of the offer/request please note the following:
- Requests for help will only be approved if the organisation requesting the help is based in the county of Surrey.
 - Offers of help can be made by any organisation based anywhere, however the offer must be delivered within the county of Surrey.
- 5.6. To help you better promote your offer and/or request you can **upload images or add a web link / URL to a video** (optional). If you choose to use media, please ensure you have read and understood our **Privacy policy** and have **obtained explicit consent to use the media** as you will be required to confirm this in order to publish your post.

Media

 ADD IMAGE
  ADD VIDEO

Description *

B *I* U  

5.7. In the “**Description**” text box you should provide a summary of the request / offer. This is your opportunity to outline why other organisations should either provide you with the help you are requesting or claim the help you are offering. The more information you provide the easier it will be for other organisations to make their decision.

5.8. To make your post easier to find you can add tags, for example #volunteers #training. This is optional - you can still publish a post if you choose not to use tags.

Tags

Use a space to separate tags

Tag your offer or request to make it easier for organisations to find when they search the marketplace e.g
#communityproject

5.9. Ensure you have enabled on “**Notifications**” in your “**Account**” (see 4.10 for instructions on how to do this).

5.10. The Marketplace can only be used to request and/or offer **non-financial** support.

5.11. To meet requests when they are needed and take advantage of help when it is available it is important to keep posts up to date. **The default date for expiry on all posts is 3 months.** After this period your post will be archived into your account. You can edit the date in your account at any time to keep the post visible and live.

5.12. To help make it easier for organisations to find requests and offers you must select the “**Type**” of resource you are looking for.

Type

☐ Volunteering

☐ Space

☐ Equipment

☐ Skills & Knowledge

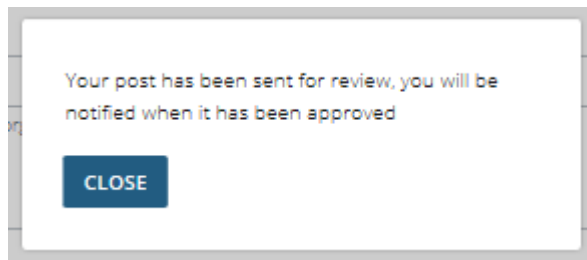
☐ Educational

☐ Other

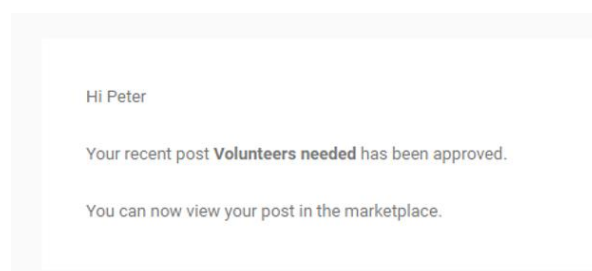
5.13. If you don't have all the information you need, you can click "**Save Draft**" and the post will be saved in your account.

5.14. If you have completed the information, then click "**Preview**" to view what others will see on the Marketplace. When you are ready to make your post live click "**Publish Post**".

5.15. All posts are reviewed by the administrator before they are published on the Marketplace.



- a) If there is an issue with your post, you will receive an email from the administrator outlining the reason why your post was not published.
- b) If there are no issues with your post you will receive an email to inform you that your post has been published and is live on the Marketplace.



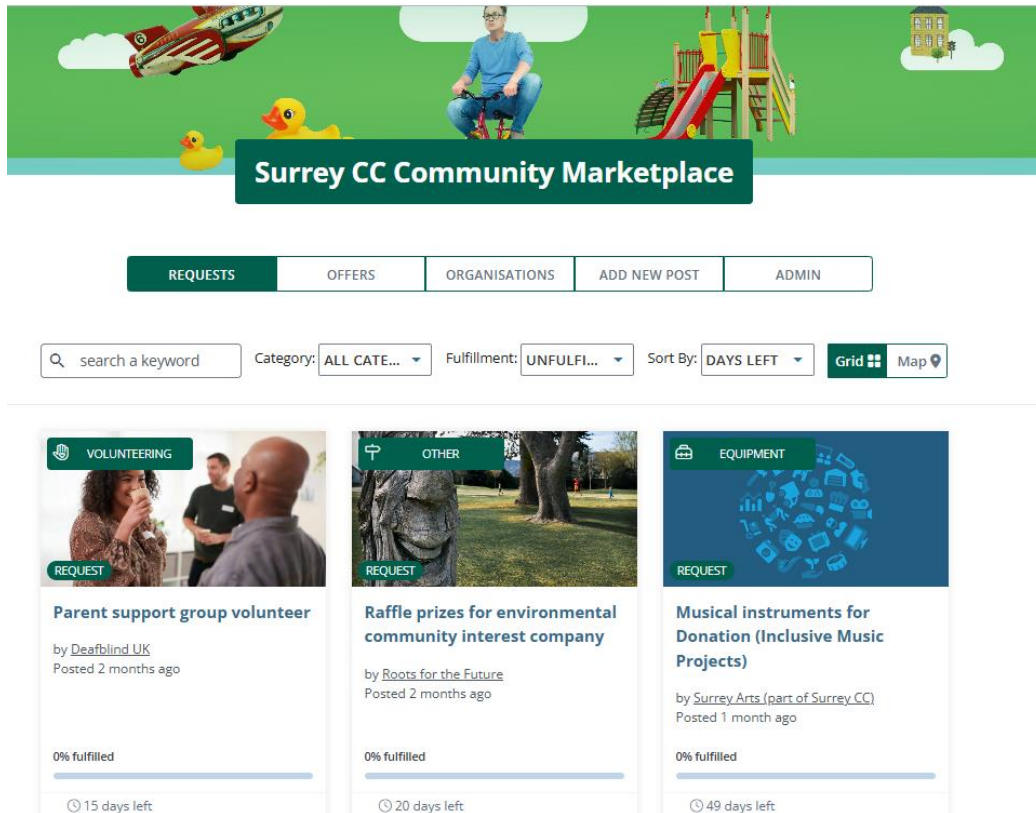
5.16. When your post has been published other organisations will be able to view your request / offer and will contact you if they can help / want the resources you are offering.

5.17. Key points to remember:

- It is entirely up to organisations to decide who to work with
- By posting an offer or request there are no guarantees that an organisation will respond to your request or claim your offer
- The posts made by organisations can be changed at any time
- If the offer you have posted is no longer available, please ensure you log into your account and either archive the post, or mark it as fulfilled if someone has claimed the offer

6. Responding to a Request for Help and/or Claiming an Offer of Help

- 6.1. To view the requests or offers click “**Marketplace**” on the main task bar at the top of the page. Click the **requests / offers tab** to view what organisations need or how organisations can help.



- a) You can use filters and sorting tools to specify types of requests/offers and expiry dates.
- a. Can sort by: “Days Left”, “Oldest First”, “Newest First”
 - b. Can toggle between “Unfulfilled” and “Fulfilled”
 - c. Can apply a “Category” filter to search for specific types of requests/offers e.g. volunteering
 - d. Use the search box
- b) The fulfilment level indicates how much of the request has already been met, or how much of the offer has already been claimed
- 6.2. You are advised to review the information about the post and the organisation before you submit an offer of help or claim an offer of help.

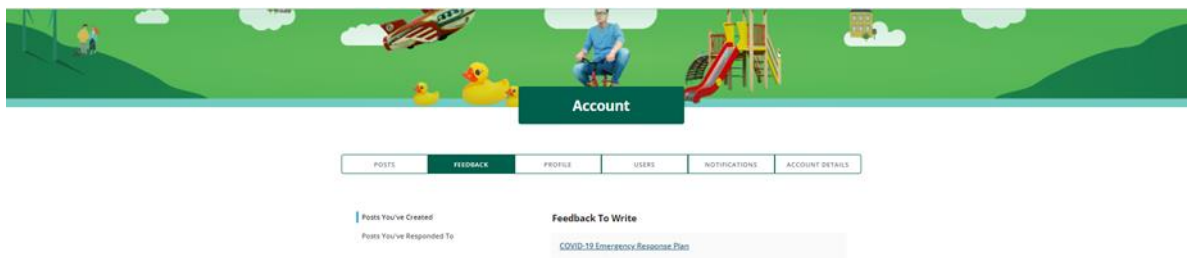
- 6.3. Click **“Offer Help”** to respond to a request or **“Claim Offer”** if you want the help available.

The screenshot shows a web form for volunteering. At the top left is a '← BACK' link, and at the top right is a 'REPORT POST' button. The main title is 'Volunteers needed' with a 'Volunteering' icon below it. On the left is a sidebar with links: 'About', 'Who', 'Where', 'When', and 'Offer help'. The main content area shows: 'Test post about volunteers that will be accepted', a 'TEST' link, the address '10 High Street, Town, ABC 123', the date '11 July 2022' with '91 days left', and an email 'Send as lisa.hazle@eaststrusser.gov.uk'. Below this is a large text box with the placeholder 'Thank you. Please use this box to contact us or to tell us how you would like to help us.' At the bottom, there is a disclaimer: 'This message and your contact details will be shared with the organisation that has posted the request. This organisation will contact you directly to discuss further. Please note we cannot guarantee messages will be sent securely.' and a 'SUBMIT OFFER' button.

- 6.4. To offer help or claim an offer you should use the text box provided to send an introductory message to the organisation that posted the request or offer.
- a) If responding to a request, you should inform the organisation why you want to help and how you can help them.
 - b) If responding to an offer, you should inform the organisation why you need the help they are offering and how much of their help you need.
- 6.5. When you have completed your message click **“Submit Offer”** in response to a request or **“Claim Offer”** in response to an offer of help.
- 6.6. An email with your message will be sent to the organisation that posted the offer or request you responded to, and they will contact you if they are interested in working with you.

7. Giving and Receiving Feedback

- 7.1. It is a **mandatory requirement** for all organisations to provide feedback on the benefits delivered or received through the Marketplace. Feedback will be used to ensure the continuous improvement of the Marketplace and could be used in case studies to underline the positive impact of the tool.
- 7.2. When you respond to a post and send a message to an organisation to either **“Offer Help”** or **“Claim Offer”** it is automatically logged in the **“Feedback to Write”** section of your account.



- 7.3. In the **“Feedback”** section you can view feedback based on
- a) **“Posts You’ve Created”** – a list of organisations that responded to your posts will automatically be created in this section
 - b) **“Posts You’ve Responded to”** – a list of the organisations whose posts you responded to will automatically be created in this section
- 7.4. In both **“Posts You’ve Created”** and **“Posts You’ve Responded to”** feedback is sorted as follows
- a) **“Feedback to Write”** – In this section you need to confirm if you worked with an organisation or not.
 - b) **“Past Feedback You’ve written”** – In this section you will find information on the feedback you have already provided and shared with the organisation/s you worked with and the administrator.
 - c) **“Feedback you have received”** – In this section you find information on the feedback you have received from others.
- 7.5. In the **“Feedback To Write”** section, if you select **“No”** to working with an organisation, this will be deleted from your organisation profile and no further action is required by you. If you select **“Yes”** you will be required to provide further information as detailed below.

How was your experience working with them?

☒ Good ☐ Bad

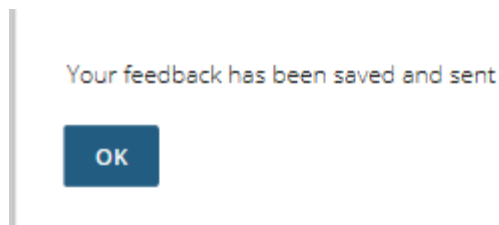
Please give us some detail

Let us know

Attach evidence

☐ I consent to my feedback being used to promote the marketplace

- Provide feedback on your experience with working with the organisation
- Provide details on what benefits you received or provided
- Attach an image or add a link to a video as evidence that you received or provided the benefits
- If you add an image or video link you must confirm you have explicit consent to use the media
- Tick the box to provide consent to your feedback being used to promote the Marketplace
- Click “**Submit Feedback**”



- 7.6. When you submit your feedback, it will be sent to the organisation you worked with and the Marketplace administrator. Your feedback could be used in case studies to underline the positive impact of the tool.