



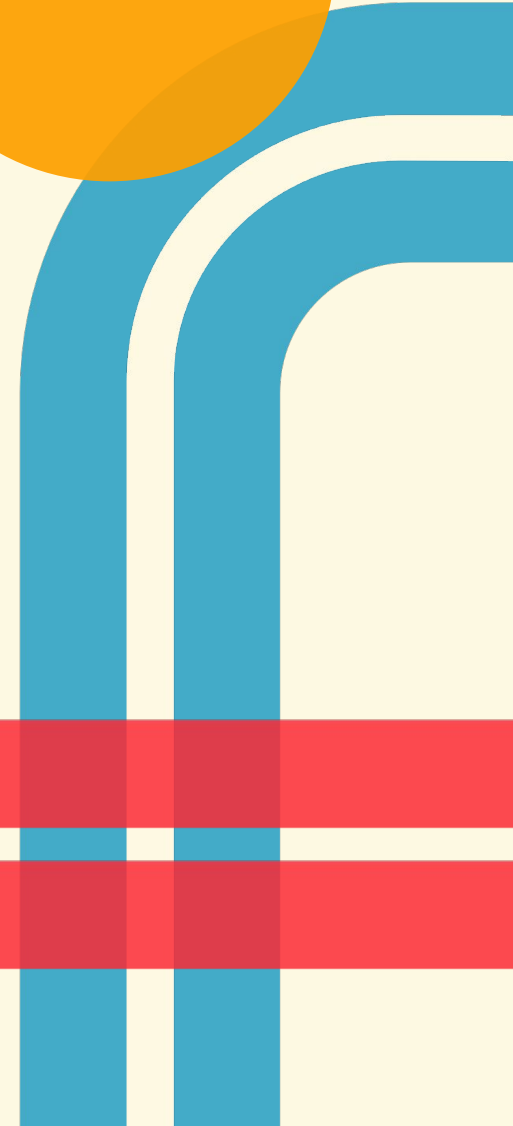
# Communicating with colleagues

**Top tips to maximise your internal relationships and your fundraised income**

**Patty Da Silva**



**Head of Trusts & Foundations, BHF**



# Line Up

**Budget setting**

**1**

**Pipeline management**

**2**

**Proposal writing**

**3**

**Reporting impact**

**4**

**Summary**

**5**

The image features a light cream background with several abstract, thick, rounded lines in green, blue, and red. A green line starts from the left, curves down, and then continues horizontally. A blue line starts from the bottom, curves up, and then continues horizontally, overlapping the green line. A red line starts from the top right and curves down. There are two black dots: one on the green line at its first curve and another on the green line where it overlaps the blue line. A solid orange circle is positioned on the left side of the image.

# **External context**

**1**

# Budget setting

**Proactive  
and regular**

**Well  
informed**

**Specific**



**1b**

# Sample budget

**X CHARITY TRUSTS / MAJOR DONOR FUNDRAISING INCOME**

Patty's 24/25 income phasing

**2024/25 PHASED BUDGET**

donor	April	May	June	July	August	September	October	November	December	January	February	March	Total	Value of ask
<b>Pledged (90%)</b>														
X Charitable Trust		1125			1125			1125			1125		4500	5000
<b>Low risk (75%)</b>														
X Charitable Trust	3000						3750						6750	9000
<b>Medium risk (50%)</b>														
X Charitable Trust									2500				2500	5000
<b>High risk (25%)</b>														
X Charitable Trust							1250						1250	5000
<b>High risk (10%)</b>														
X Charitable Trust						500							500	5000
XXX activity/campaign	0	0	1900	1900	1900	1900	1900	1900	1900	1900	1900	1900	19000	190000
<b>Unidentified - high risk</b>														
New Business / unsolicited	10000	10000	5000	5000	5000	5000	5000	5000	5000	5000	10000	5000	75000	150000
														Total Value of Asks:
<b>GRAND TOTAL (monthly)</b>	13000	11125	6900	6900	8025	7400	11900	8025	9400	6900	13025	6900	£ 109,500	£ 369,000
<b>GRAND TOTAL YTD</b>	13000	24125	31025	37925	45950	53350	65250	73275	82675	89575	102600	109500	£ 109,500	

**1c**

# Sample budget

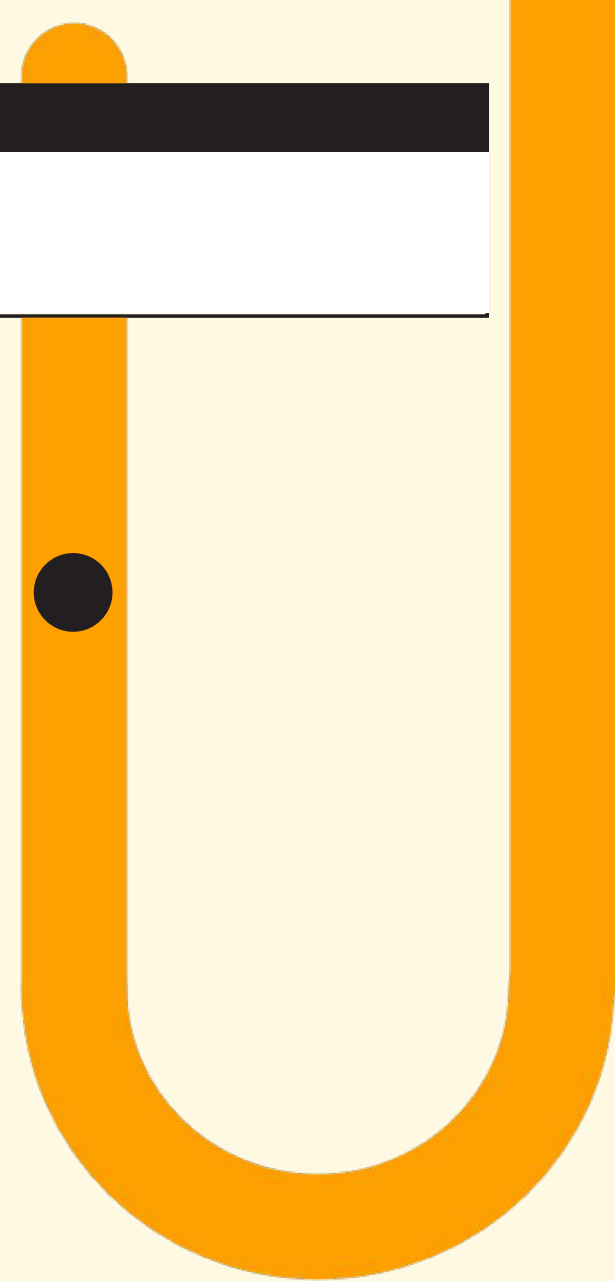
Category	Total	%
Pledged 90% income total	£21,600	10
Low risk 75% income total	£25,500	12
Medium risk 50% income total	£43,000	19
High risk 25% income total	£24,250	11
High risk 10% income total	£32,000	14
Unidentified / new business	£75,000	34

Quarter	Total	%
Q1	£49,950	23
Q2	£63,575	29
Q3	£70,450	32
Q4	£37,375	17
Check total	£221,350	100

Risk	Total	%
Low Risk	£25,500	12
Medium Risk	£43,000	16
High Risk	£131,250	60
Pledged	£21,600	12
Total	£221,350	

**2**

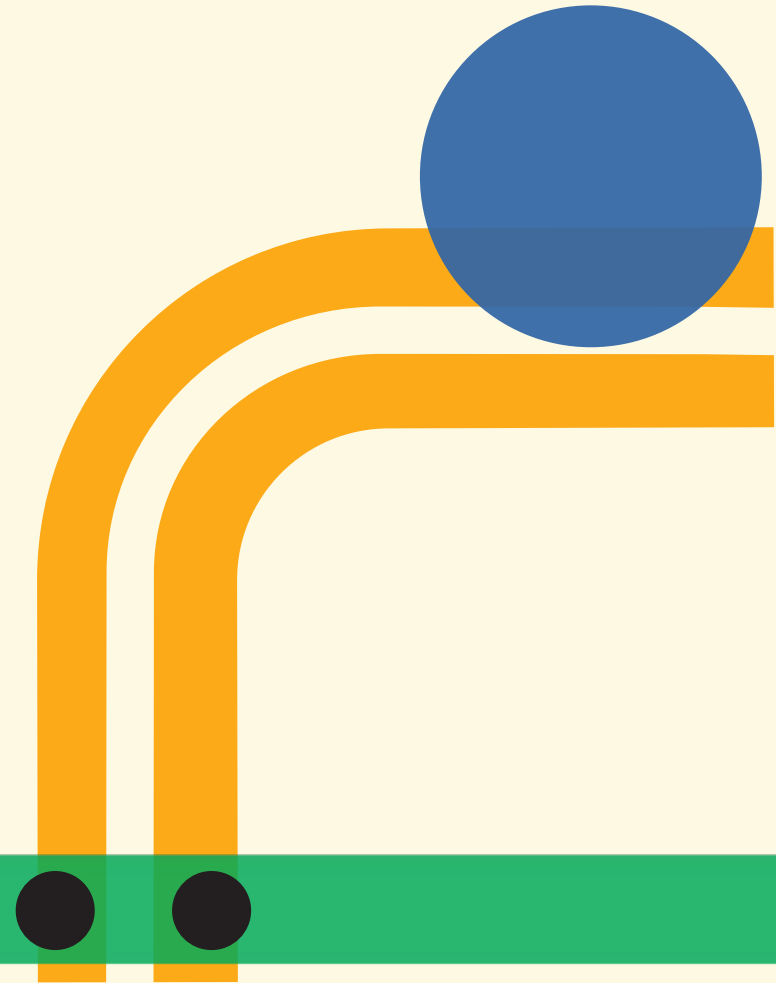
# Pipeline management



**3**

## **Proposals and Impact reports**

- **Timely**
- **Systematic**
- **Give Feedback**





# Summary

- **Know your numbers**
- **Take time to reflect, especially at the end of the FY**
- **Be proactive in your communications – with good and bad news**
- **Take time to build relationships with colleagues you will be working closely with, not just when you need them**

The image features a light cream background with abstract, thick, rounded lines in red and orange. On the left, a vertical orange line descends from the top, with two horizontal red lines crossing it. A black dot is at their intersection. To the right, a vertical red line descends from the top, with a black dot on it. In the bottom right, a green circle contains a black question mark. The text "Any Questions" is centered in a bold, black, sans-serif font.

**Any  
Questions**