


# JULY MOMENTUM

## PLANNING GUIDE

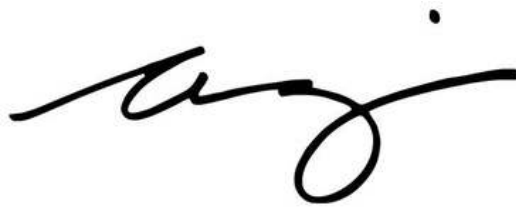


Angie Thompson  
CONSULTING LLC

[AngieThompsonConsulting.com](http://AngieThompsonConsulting.com)



**What we do when there is no  
immediate pressure often  
determines what becomes  
possible when the  
pressure arrives.**



**July Momentum Planning Guide**

Building relationships, stories, and  
opportunities before they become urgent.

# JULY MOMENTUM PLANNING GUIDE

## Five Actions to Strengthen Relationships, Build Opportunities, and Prepare for Year-End Success

July often provides a brief opportunity to pause before the busy fall season begins. Use this guide to identify relationship-building activities, sponsorship opportunities, legacy conversations, and storytelling assets that will help create momentum for the final quarter of the year.

### 1. Strengthen Relationships Before You Need Them

Strong fundraising rarely begins with an ask. It begins with consistent, meaningful relationships.

#### Donors to Reconnect With

- Lapsed donors from the past 12–24 months
- First-time donors who have not given again
- Donors who have not attended an event recently
- Long-time supporters who deserve a personal thank-you

Names:

---

---

---

---



## Community Relationships to Strengthen

- Business leaders
- Community partners
- Foundation representatives
- Civic organizations
- Referral partners

Names:

---

---

---

## Reflection Question

Who would be surprised to receive a phone call from us simply because we wanted to reconnect? Why?

## 2. Create Legacy Conversations

August is Make-A-Will Month. July is the time to prepare.

### EDUCATIONAL EVENT PLANNING

Potential Event Date:

---

Potential Venue:

---

Professionals to Invite

- Estate Planning Attorney
- Financial Planner
- CPA
- Trust Officer
- Wealth Advisor

Names:

---

---

---

---

---

## Potential Attendees

- Long-time donors
- Former board members
- Volunteers
- Community supporters
- Major gift prospects

Names:

---

---

---

---

---

---

---

## Legacy Conversation Notes

What message would you like attendees to remember about your organization's long-term impact?

---

---

---

---

---

---

---

---

## 2. Identify Sponsorship Opportunities

Before asking for sponsors, identify the assets your organization already possesses.

### Organizational Assets Inventory

Check all that apply:

- |  |   |
|--|---|
| <input type="checkbox"/> Email newsletter      | <input type="checkbox"/> Volunteer network      |
| <input type="checkbox"/> Social media audience | <input type="checkbox"/> Community partnerships |
| <input type="checkbox"/> Website visibility    | <input type="checkbox"/> Printed materials      |
| <input type="checkbox"/> Event attendance      | <input type="checkbox"/> Speaking opportunities |
| <input type="checkbox"/> Educational programs  | <input type="checkbox"/> Community reputation   |

Additional Assets:

---

---

---

**Potential Business Partners**

Businesses that share an affinity for our mission:

---

---

**Existing Sponsors to Cultivate**

Sponsors we should thank, update, or meet with this month:

---

---

---

**Reflection Question**

What value can we provide to sponsors beyond logo placement?

---

---

## 4. Capture Stories While They Are Happening

The best year-end stories are rarely gathered in November.

### Stories to Collect

- Participant Story
- Volunteer Story
- Donor Story
- Staff Story
- Board Member Story

### Photos Needed

- Program participation
- Volunteers in action
- Community engagement
- Event photos
- Behind-the-scenes activities

### Testimonials Needed

Who should we interview?

---

---

---

## Reflection Question

What changed because our organization was present?

---

---

---

## 5. Prepare for the Fourth Quarter

The final quarter arrives faster than most organizations expect.

### Year-End Appeal Planning

Potential Theme:

---

---

### Statistics to Gather

- |  |   |
|--|---|
| <input type="checkbox"/> Individuals served    | <input type="checkbox"/> Community impact metrics |
| <input type="checkbox"/> Volunteer hours       | <input type="checkbox"/> Event attendance         |
| <input type="checkbox"/> Program participation | <input type="checkbox"/> Sponsorship support      |

Other metrics:

---

---

---

## Stories to Feature

---

---

---

---

## Final Reflection

What can we do in July that will place us in a stronger position before the final quarter arrives?

---

---

---

---

## Remember:

"It's what you do when you don't have to do anything that puts you where you want to be before it's too late to do anything to get there."

Angie Thompson | Fundraising Strategist  
Email: [Angie@AngieThompsonConsulting.com](mailto:Angie@AngieThompsonConsulting.com)

Page11



**Angie Thompson**  
CONSULTING LLC