



---

# Your Mid & Major Donor Fundraising Action Plan

A Step-by-Step Guide to Building Relationships  
and Raising More Money

## Introduction

Whether you're new to mid-level and major donor fundraising or want to sharpen your approach, this month's Action Path will help you move confidently from identifying great donor prospects to making powerful, personal asks — by mail, phone or in person.

This guide brings together the most practical training, tools, templates and examples from Moceanic. It's your shortcut to doing the most important donor work — strategically, efficiently and with heart.

You can either follow the plan from start to finish or choose the modules or tools that you need right now.

---

## Who This Action Plan Is For

This resource is for anyone who works with donors capable of giving gifts of large gifts — that could be \$1,000, \$5,000 or \$10,000+, especially if:

- You're juggling a donor portfolio but not sure how to prioritize.
  - You want to deepen donor relationships with meaningful engagement.
  - You're preparing to make direct asks — via mail, phone or face-to-face.
  - You work solo or in a small team and need to focus your time on the highest-value donors.
- 

## Key Concepts You'll Learn

- Mid-level & Major Donors: Not just the wealthiest — they're the most generous.
  - RFV (Recency, Frequency, Value): The segmentation strategy to identify your best prospects.
  - How to confidently ask a mid or major donor for a large gift in a way that feels natural, personal and deeply rewarding for them.
  - Stewardship Journey: Consistent, thoughtful communication after the gift to increase retention and upgrades.
-

# 1. How Many Mid-level & Major Donors Can I Manage?

## Learn:

- How to define your capacity to build personal relationships with donors.
- Why 30, 60 or 100 donors might be your sweet spot — not 1,000+.

## Module:

- [VIDEO](#). Sean explains how to calculate the number of donors you can relationship manage.

## Tools:

- [The Cost of You](#). Sean's bonus video explainer of the cost of YOU, how it's calculated, and how to use that information.
- [Top Tips to More Efficient Donor Meetings](#). This guide teaches you how to balance your limited resources to make the most of your donor meetings.

---

# 2. How Do I Find My Mid-level and Major Donors?

## Learn:

- How to uncover “hidden treasure” in your database.
- Use RFV scoring to identify high-potential givers.
- Spot signs of generosity and upgrade potential.

## Modules:

- [The Maths of Mid-Value Donors](#). Math might not seem important to a program that is all about relationships, but this workshop will teach you how to create a **sustainable, replicable and profitable** program.
- [Major Donors Next Week](#). If you want to jump in the deep end and start straight away, this workshop tells you how.

- [Supporter Connection Survey](#). The incredible mailing that changes everything and shows you how to build your mid-value/major donor program from the ground up (not to mention your regular giving and bequest too!).
- [The Hidden Treasure of Fundraising](#). If you're not sure why mid and major are so important, watch this and see where the big fundraising dollars come from.

#### From the Bonus Section:

- [Understanding the Pareto Principle](#). A 4-part video series that explains the mathematical formula that pops up everywhere in fundraising.
- [Your Essential Guide to RFV](#). Recency, Frequency and Value – what it is, what it does and how to use it.

#### Tools:

- [Your Mid-Value Potential Calculator](#) (as soon as you click this link it will INSTANTLY download to your computer).

---

## 3. How Do I Ask?

This is one of the most powerful parts of your fundraising journey — actually making the ask.

[Making the Big Ask](#). This is a hands-on workshop that shows you how to confidently guide a donor conversation from connection to commitment — including what to say, when to ask, and how to respond — so you can unlock transformational gifts with skill and heart.

You'll get practical scripts, templates and conversation tips to help you make the ask in a way that feels natural and aligned with your donor's values — so that every ask becomes a meaningful opportunity, not a moment of pressure.

### By Mail

#### Learn:

- How to write direct mail appeals that inspire larger gifts.
- Use storytelling and donor-centric language to motivate action.

#### Modules:

- [Release the Explosive Generosity of Your Donors Workshop](#). Direct mail is still by far and away the biggest source of mid-value donors, and the biggest channel for

triggering an above average gift. Whether your job is direct mail or not, if you are interested in mid-value donors this session is going to help.

### Tools:

- [\*\*The Big Fundraising Appeal Swipe File\*\*](#). This is a treasure trove of real-life appeals sent to high value donors. Copy, adapt and use them for inspiration.
- [\*\*Your High Value Direct Mail Essential Checklist\*\*](#). This checklist ensures you don't miss any critical elements when creating powerful, donor-focused mail packs that are designed to inspire and engage your top supporters.

## By Phone

### Learn:

- The structure of a great phone ask: warm-up, story, ask, response.
- How to balance empathy and clarity in conversation.

### Modules:

- [\*\*Making the Big Ask\*\*](#). This workshop shows you how to ask for a big gift without breaking into a nervous sweat — just real conversations, real generosity, and really good results.
- [\*\*The Money Mindset Workshop\*\*](#). Feel uncomfortable about asking for big gifts? This workshop will help you unpack your beliefs around money and fundraising and start feeling confident and generous in your asks and thanks.

### From the Bonus Section:

- [\*\*Vicki Rasmussen on avoiding the 'no' in asking\*\*](#). This video will help you use language that encourages an ongoing dialogue.

### Tools:

- [\*\*Your Guide to Asking for Big Gifts\*\*](#). This guide walks you through donor chats that feel good, go deep, and end with a confident, "So... would you consider a big, beautiful gift?"
- [\*\*Amy Eisenstein's Quick Reference Guide to Virtual Asking\*\*](#). A handy pdf for video or hybrid phone/Zoom calls — includes question prompts and phrasing examples.
- [\*\*Money Mindset Makeover Workbook\*\*](#). Help change how you think about money.

## In Person

### Learn:

- How to balance the resources you have to get the most out of this valuable way of asking.
- How to plan and deliver an in-person ask.

### Modules:

- [Major Donors Next Week](#). Need to get started fast? Learn how to use what you already have to start asking your high value donors.
- [Making the Big Ask](#). This module shows you how to ask for a big gift without breaking into a nervous sweat — just real conversations, real generosity, and really good results.
- [The Money Mindset Workshop](#). Feel uncomfortable about asking for big gifts? This workshop will help you unpack your beliefs around money and fundraising and start feeling confident and generous in your asks and thanks.

### From the Bonus Section:

- [Amy Eisenstein on visiting donors](#). Amy chats with Sean about how to overcome the barriers to meeting and asking for a big gift.
- [Using Amateur Video to Help you Make the Ask](#). In this video, Sean shows how you can use amateur video to help you make an ask.
- [Vicki Rasmussen on avoiding the 'no' in asking](#). This video will help you use language that encourages an ongoing dialogue.

### Tools:

- [Top Tips to More Efficient Donor Meetings](#). This guide teaches you how to balance your limited resources to make the most of your donor meetings.
- [Using a Draft Appeal For A Case For Support](#). Don't have time to figure out your Case for Support — you don't need to, you already have it written!
- [WWF MV Proposal Example](#). See how WWF Australia used an appeal to create their Case for Support.
- [Amy Eisenstein's Quick Reference Guide to Virtual Asking](#). (Again!) Practical, whether you're asking at a lunch, on-site or in a boardroom.
- [Your Guide to Asking for Big Gifts](#). This guide walks you through donor chats that feel good, go deep, and end with a confident, "So... would you consider a big, beautiful gift?"
- [Money Mindset Makeover Workbook](#). Help change how you think about money.

## 4. How Do I Keep Donors Engaged After They Give?

### Learn:

- How to design and deliver an amazing stewardship experience.
- Avoid donor fatigue and inspire long-term commitment.
- Learn how to balance reactive and proactive donor stewardship.

### Module:

- [3 Easy Steps to Mid Value VIPs](#). This module gives you three simple, high-impact ways to treat your mid-value donors like the VIPs they are — so they feel seen, appreciated, and inspired to give again.
- [Donor Love Made Practical](#). Discover what donor love is all about and what you can do in practice to make it real for your donors.
- [How to Write Your Best Ever Donation Thank-You Letter...Every Time!](#) The amazing Lisa Sargent walks you through all the ingredients you need to build your best-ever donation thank-you letter – every time – by post or by email.

### Tools:

- [Thank You Letter Template](#)
- [The Better Donation Thank You Letter Checklist](#)
- [Lisa Sargent's One Page of Thank You Swipables](#)

---

**Need more help?** If you want help or have something to share on this subject, please jump into the [Fundraisingology Lab Members-only Facebook Group](#). Look for the thread with these hashtags: #MAP #MidValue #MajorDonor. If you can't find it, please start a new post – and remember to add some hashtags!

## Quick Reference: All Resources by Type

Format	Resources
Excel Tools	<a href="#">Mid-Value Potential Calculator</a>
Checklists	<a href="#">Mid-Value Direct Mail Essential Checklist</a> <a href="#">The Better Donation Thank You Letter Checklist</a>
Templates	<a href="#">Draft Appeal Case for Support</a> <a href="#">Thank You Letter Template</a>
Guides	<a href="#">Top Tips to More Efficient High Value Donor Meetings</a> <a href="#">Your Guide to Asking for Big Gifts</a> <a href="#">Telephone Talking Notes</a> <a href="#">Amy Eisenstein's Quick Reference Guide to Virtual Asking</a> <a href="#">Using a Draft Appeal For A Case For Support</a> <a href="#">Money Mindset Makeover Workbook</a>
Examples	<a href="#">WWF MV Proposal Example</a> <a href="#">Big Fundraising Appeal Swipe File</a> <a href="#">Lisa Sargent's One Page of Thank You Swipables</a>
Short Videos	<a href="#">How many donors can I relationship manage?</a> <a href="#">The Cost of You</a> <a href="#">Understanding the Pareto Principle</a> <a href="#">Your Essential Guide to RFV</a> <a href="#">Vicki Rasmussen on avoiding the 'no' in asking</a> <a href="#">Amy Eisenstein on visiting donors</a> <a href="#">Using Amateur Video to Help you Make the Ask</a>
Courses	<a href="#">The Maths of Mid-Value Donors</a> <a href="#">Major Donors Next Week</a>



	<p><a href="#"><u>Release the Explosive Generosity of Your Donors Workshop</u></a></p> <p><a href="#"><u>3 Easy Steps to Mid Value VIPs</u></a></p> <p><a href="#"><u>Making the Big Ask</u></a></p> <p><a href="#"><u>Supporter Connection Survey</u></a></p> <p><a href="#"><u>The Hidden Treasure of Fundraising</u></a></p> <p><a href="#"><u>The Money Mindset Workshop</u></a></p> <p><a href="#"><u>Donor Love Made Practical</u></a></p> <p><a href="#"><u>How to Write Your Best Ever Donation Thank-You Letter...Every Time!</u></a></p>
--	--