

TWO SOCIETIES, ONE LAUNCH:

Balancing Planned Giving & Athletics

A Strategic Workbook
for Advancement
Leaders



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Developed from practice in resource-constrained institutions



THIS IS NOT A TEXTBOOK CASE

This workbook reflects the realities of advancement leadership in environments where expectations remain high but capacity is limited. It is informed by practice within a small, resource-constrained institution navigating competing priorities, evolving strategy, and the ongoing work of building a culture of philanthropy.

While the context for this work is rooted in experience at Jarvis Christian University, the challenges explored here are not unique. Advancement leaders across institutional types are increasingly asked to balance long-term philanthropic strategy with immediate institutional needs, often with limited staff, systems, and infrastructure.



PURPOSE OF THIS WORKBOOK

This resource is designed to support advancement professionals in:

- Assessing the structure and effectiveness of their giving societies
- Identifying misalignment between strategy, messaging, and capacity
- Developing approaches that strengthen donor engagement and long-term sustainability

HOW TO USE THIS TOOL

This workbook is not aspirational.

It is diagnostic.

It requires honest assessment of current reality—not ideal conditions.

Participants are encouraged to engage each section with candor, focusing on current reality rather than ideal conditions. The value of this exercise is not in completing the framework, but in identifying where clarity, alignment, and intentionality are most needed.

The work ahead is grounded in a simple but demanding framework:

Define Behavior → Align Psychology → Design Experience → Phase Launch → Sustain

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SECTION 1: Your Institutional Reality

Instructions: Be honest. This is not aspirational—this is your current reality.

Staffing for Advancement:

- Total FTEs:
- Dedicated Planned Giving Staff? Yes No
- Dedicated Athletics Development Staff? Yes No

Donor Base:

- Total Active Donors: _____
- of donors giving \$5,000+: _____
- Recurring Giving Program? Yes No

Current Giving Societies:

- None
- Recognition Only (tiers, names, plaques)
- Engagement-Based (events, touchpoints)
- Hybrid

In one sentence, describe your reality:

SECTION 2: The Tension Check

Circle where you are on each spectrum:

Messaging

Legacy ← 1 2 3 4 5 6 7 8 9 10 → Urgent

Timeline

Long-Term Cultivation ← 1 2 3 4 5 6 7 8 9 10 → Immediate Revenue

Capacity

Understaffed ← 1 2 3 4 5 6 7 8 9 10 → Fully Staffed

Reflection:

Where is your biggest tension? What is competing for your attention right now?

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SECTION 3: Define the Behavior (Step 1)

What donor behavior are you trying to drive? *(Be specific—this is not “increase giving”)* Examples: *Include institution in estate plans; Join recurring giving program; Attend athletics fundraising events;*

Your Priority Behavior:

What does success look like in 12 months?

What changes if this works?

SECTION 4: Align with Donor Psychology (Step 2)

Which audience are you prioritizing?

- Planned Giving (legacy, trust, long-term)
- Athletics (passion, pride, immediacy)
- Other _____

What motivates this audience?

What message currently dominates your communications?

Is there misalignment? Yes No

If yes, where?

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SECTION 5: Design the Experience (Step 3)

Membership Criteria:

Recognition (what do they receive?):

Stewardship Touchpoints (list at least 3):

1.

2.

3.

Communication Plan (how often + where?):

Reality Check:

Did you already have this built?

Yes No

SECTION 6: Phase the Launch (Step 4)

What phase are you currently in?

- Not started
- Internal alignment
- Quiet cultivation
- Public launch

What have you skipped?

What should you slow down to fix?

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SECTION 7: Sustain the Strategy

Who owns this long-term?

What systems support it?

What will break first under pressure?

SECTION 8: Your 30-Day Action Plan

What is ONE thing you will implement in the next 30 days?

What is ONE thing you will stop doing?

Who do you need buy-in from?

OTHER NOTES



**ADVANCEMENT STRATEGY IS NOT DEFINED BY RESOURCES—
IT IS DEFINED BY CLARITY, ALIGNMENT, AND EXECUTION.**

Access Session Materials



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