

SOUTH CENTRAL

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# Two Societies, One Launch: Balancing Planned Giving & Athletics



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# Does your institution currently have giving societies?

Yes

No

In development

# Which giving societies does your institution have?

Planned Giving  
Athletics Giving  
Both  
Neither

# How effective is your institution at managing and promoting giving societies?

Very effective

Somewhat effective

Limited capacity

Not a current focus

# What is the biggest barrier to managing giving societies?

Staffing capacity

Leadership alignment

Donor readiness

Budget

# What is a giving society?

A structured donor recognition and engagement program that groups individuals based on defined philanthropic criteria.

# Three Models of Giving Societies

# Loyalty Model

Belonging →  
Long-Term Engagement



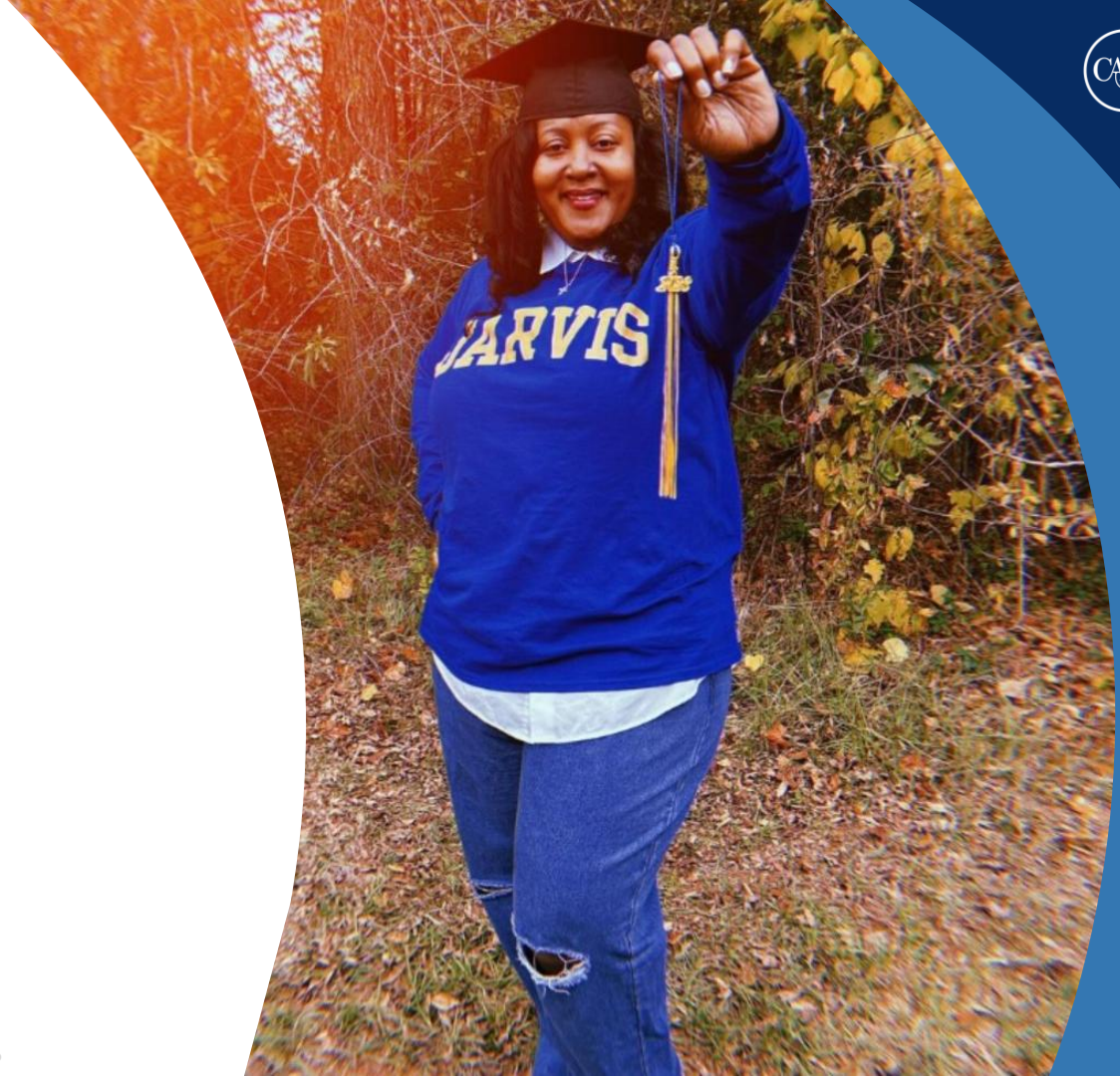
# Recognition Model

Giving Level →  
Recognition



# Hybrid Model

Mixed Signals →  
Weak Experience



# The Problem

Most institutions don't  
have giving societies

# They have giving thresholds

# This is NOT a Textbook Case

- Not a model of perfection
- Not a polished template
- A real case under constraint

**Building philanthropy in real conditions**

# Our Reality at the Time

- No planned giving officer
- 57.5% reduction in staff (8 → 3)
- Expected to maintain and grow giving

**Growth expectations did not change—capacity did**

# The Real Question!

How do you build structure  
when you don't have capacity?

# Two Strategic Priorities

## Planned Giving

- Thoughtful
- Reflective
- Educational

## Athletics

- Immediate
- Emotional
- Action-driven



# Where the Challenge Emerged

Two different strategies

One team

One timeline

**Both approaches were right—but difficult to execute together**

# Tension 1: Messaging

## Planned Giving

- Legacy
- Reflective
- Educational

## Athletics

- Energetic
- Urgent
- Emotional

**Same audience. Different messaging.**

## Tension 2: Timeline

### Planned Giving

- Long-term cultivation
- Slow growth

### Athletics

- Immediate engagement
- Rapid response

## Patience vs. Pressure

# Tension 3: Capacity

- Same staff
- Same systems
- Everything

**Limited resources across multiple priorities**

# The Realization

The challenge isn't choosing.  
It's managing both  
At the same time

# Step 1: Define Donor Behavior

- What action are you trying to drive?
- What does success look like?
- What changes because this society exists?

**Societies should drive behavior—not just recognize it**



**The Jarvis Reality: We were clear on behavior—  
but lacked systems to track it consistently**

## Step 2: Align with Donor Psychology

### Planned Giving

- Legacy
- Impact beyond lifetime
- Trust and education

### Athletics

- Passion
- Pride
- Immediate connection

**Different donors require different strategies**



**The Jarvis Reality: Alignment was intuitive—but not formalized in messaging or campaigns**

# Step 3: Design Recognition & Stewardship

- Membership criteria
- Recognition structure
- Stewardship touchpoints
- Communications plan

**If you don't design the experience, donors won't feel it**



**The Jarvis Reality:** This did not fully materialize—recognition was limited primarily to publication

## Step 4: Phase the Launch

- Internal alignment
- Quiet cultivation
- Public rollout

**Pace is a strategy—not a weakness**



**The Jarvis Reality: Our “launch” focused on updating the website—establishing a baseline before broader rollout**

## Step 5: Sustain Long-Term

- Ongoing stewardship
- Staff ownership
- Integration with advancement strategy
- Alignment with campaign priorities

**Launching is easy—sustaining is the work**



**The Jarvis Reality: Sustainability remains a challenge with a 3-person team managing competing priorities**

# The Framework

**Define → Align →  
Design → Phase → Sustain**

# Why it works?

**Clarity →**

**Alignment →**

**Sustainability**

# Apply the Framework

- Assess your current approach
- Identify your primary tension
- Align strategy with capacity

# Where We Are in the Framework

Step	Status
Define Behavior	Strong
Align Psychology	Moderate
Design Experience	Limited
Phase Launch	Foundational
Sustain	Ongoing Challenge

# What Changed Because of This Work

# Athletics Giving

- From negligible → active team engagement
- Coaches initiating fundraising conversations
- New interest in revenue-generating events

# Planned Giving

- From no tracking → defined tracking system
- From 0 → ~14 identified/planned commitments
- Active conversations with community foundation & banking partners

# Institutional Shift

- Renewed focus on giving societies broadly
- Increased internal alignment with advancement
- Movement from concept → execution

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