



## CUSTOMIZABLE GIVING OPPORTUNITIES

Several high-net-worth philanthropists have strategically invested with United Way of Calgary and Area in large scale collaborative projects. Below are three examples of investments that offered the opportunity to customize involvement and maximize impact in our community.

### Example 1

#### **FAMILY ENGAGEMENT**

##### **Passion**

Philanthropy was always important to a donor couple, and over time they began to involve their children in their charitable giving. Through a facilitated family conversation, they created a charitable investment strategy that included three focus areas and a charitable investment mix, which included a preference towards providing seed or early investment money to local programs in support of youth.

##### **Investment**

Based on the family's charitable investment strategy, United Way presented programs and initiatives for the family to consider investing in. One significant investment included providing initial seed money to launch the All In for Youth program. All In for Youth is a citywide movement that provides innovative solutions to help youth stay in school, complete school, and successfully transition to the workforce and adulthood. This initiative connects youth to positive adults, removes financial and social barriers to high school completion, and encourages varied paths of learning and success. In 2012, one in four youth were not graduating from high school on time in Calgary (within three years of starting Grade 10).

##### **Results**

Today, four in five of Calgary's youth are completing high school on time thanks in part to All In for Youth. During their five-year investment journey, the family was able to volunteer and stay involved with the initiative, providing a direct line of sight to how their investment was impacting the community.

### Example 2

#### **SOCIAL INNOVATION**

##### **Passion**

Innovation drives social change and is a key contributor to United Way's impact in the community. Through The Social Impact Lab—a physical and digital space where Calgarians work together to solve social issues in a new way—United Way and its partners are playing a critical role in developing solutions that address unmet needs of local people. This donor was passionate about helping children and believed there was a gap in the system that needed to be addressed. After touring the Lab, they felt their ideas aligned with work that was being ideated, and decided there was a great opportunity to collaborate.

##### **Investment**

The Social Impact Lab's team of dedicated strategists, architects, service designers, and researchers take a growth mindset and create trusting environments for participants to dive into complex social issues that can be tackled from new directions, in new ways. Based on their positive experience touring the Lab, this donor decided to invest in the early phases of a children and youth mental health initiative, which could be seed funded, tested and eventually scaled through the Lab. Driven by the potential to positively impact their community in new ways, the Lab environment greatly appealed to this donor.

##### **Results**

Now in the early phases of funding and exploring a children and youth mental health initiative in collaboration with the Lab, this donor is playing a participatory role in finding solutions to the complex issues that are most meaningful to them. The donor appreciates the professional, innovative environment at the Lab and looks forward to launching the initiative in Calgary, where they hope that their investment will have the greatest impact.



## Example 3

### **PARTICIPATORY PHILANTHROPY**

#### **Passion**

A recurring donor had supported United Way for over twenty years. Trusting in how United Way invests in community, this recurring annual donation was placed in the Community Investment Fund allocate this donors funding to areas of greatest need in the community. Later on, after retiring and having more time to reflect on their philanthropic goals, the donor chose to become more invested and strategic in their charitable giving. In consultation with their professional advisor on estate planning, the donor was able to create a tailored plan which included a significant philanthropic donation to United Way. Working closely with both the donor and their advisor, United Way mapped out investment options in areas most meaningful to the donor, helping to realize the donor's philanthropic goals and desire to leave a lasting charitable legacy.

#### **Investment**

When considering a charitable legacy that would impact Calgarians for generations to come, the donor's interests aligned with an early-stage United Way initiative centered on children and youth. The initiative, known as Planet Youth, is modeled after an Icelandic method to prevent and reduce at-risk behaviours among youth, and recognizes the value of long-term cultural change over the quick fix approaches typically seen in preventative methods. With a simple, personal goal of supporting Calgary's youth in leading happy, healthy lives, the Planet Youth initiative resonated with the donor's philanthropic interests and led the donor to contribute a significant, targeted donation.

#### **Results**

As a relatively new initiative in its early phases, the donor recognized the strong impact potential of designating their donation to Planet Youth. For the donor, the reward outweighed the risk as the potential to create meaningful change for generations of Calgarians represented a compelling philanthropic vision. By investing early, the donor also had a unique opportunity to participate in their philanthropy by informing some of the initiative's early phases, bringing their own values to life through community impact. The donor now sees an opportunity to invite their children and grandchildren to share in their philanthropic vision and contribute to building a brighter future for Calgary's youth.

# A better tomorrow **starts with you.**

Contact our Planned Giving Team to begin planning today or to request more information.

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