

## **UNITYPOINT AND THOMPSON & ASSOCIATES: An Unlikely Partnership Produces Long-term Results**

### **ABOUT UNITYPOINT HEALTH FOUNDATION - DES MOINES**

The UnityPoint Health Foundation has been committed to generating resources for the sustainability and advancement of health care in Des Moines and the surrounding communities since 1980. While the institutions that the foundation serves have been in existence much longer, the foundation was founded to support these institutions and help them to thrive well into the future. The generosity of individuals, businesses, and foundations has enabled them to touch the lives of the community through numerous enhancements to the health services provided at Methodist, Lutheran, Blank Children's, Methodist West, John Stoddard Cancer Center, and Taylor House Hospice.

They have partnered with Thompson & Associates since October 2004. The foundation is led by a team of ten dedicated individuals with a passion for securing funding to provide quality health care for future generations by creating opportunities for donors to support their work.

### **CHALLENGES**

The Des Moines Foundation has always had a strong track record of reaching its goals, with 35-40% of their funding coming from planned and matured gifts totaling several million dollars. At first, there didn't seem to be a need for outside assistance, but through a meeting with Thompson & Associates they realized there was so much more they could accomplish.

UnityPoint discovered among their donors who had given \$100,000 or more, in varying stages of life, there was a gap in their demographics. Affluent individuals with no children were an untapped resource requiring additional planning. Their current giving was consistent, but there was very little future giving. Thompson & Associates helped UnityPoint realize that this required a unique planning process as a service to the donor. As they evaluated the various life situations of potential donors, addressing single individuals without children was a huge opportunity to grow their base.

### **INSIGHTS**

After a six-month process, the foundation team decided to bring in Thompson & Associates to present their program to the entire system of seven hospitals. Don-Ireland Schunicht, the Senior VP of UnityPoint was hesitant. He knew that his team was doing an excellent job and wasn't sure how much of a difference Thompson & Associates could make.

After a personal meeting with Thompson & Associates, Don decided to give it a try. As he became better acquainted with Thompson & Associates' services and their unique approach, Don finally became excited to implement it. Today, UnityPoint Health - Des Moines Foundation is one of Thompson & Associates' longest running and most successful clients.

In the beginning, there were questions from financial advisors regarding how their role with the foundation would be impacted. With help from Thompson & Associates, they quickly understood this was not an effort to replace them, but to enhance the work they were already doing. This was a new concept for the advisors and one that they now have come to embrace with excitement. They are now one of the health system's top referrers for Thompson & Associates' planning services. The primary factor in this was getting to know their associate and gaining an increasing understanding of how this would have a positive effect on their planned giving.

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### IMPLEMENTATION

The old axiom still holds true: creating appropriate expectations leads to success. Potential donors need this from nonprofit organizations, and Thompson & Associates provides it.

The key to successfully implementing the Thompson & Associates program involves building relationships with supporters while clearly defining the role of Thompson & Associates. After a series of nurturing conversations, the team invites the donors for lunch and presents a simple call-to-action: a 30-minute meeting with the Thompson associate.

UnityPoint discovered that presenting the program to smaller groups of three or four and looping in members of the full board has been critical to the program's success.

UnityPoint employs an informal approach to inviting people to join with them, approaching those who may be interested to hear about the work they are doing in a no pressure, no obligation meeting. They recognize people will remain hesitant, so they leave it open-ended. They have also realized some success by reaching out to emeritus medical staff. Those already invested at some level are far more likely to be open to planned giving, and only need to be asked.

In short, setting up the program is a simple task. The primary challenge is making the best decisions regarding who to include in the process by involving each member of the foundation staff.

People's financial circumstances and numbers might change, but their values do not change. Thompson & Associates' process creates a plan that matches their values.

### RESULTS

Beyond the measurable financial results, the greatest success of the partnership with Thompson & Associates is the enjoyment it brings to the team. Laughter is a regular part of the environment when their associate is visiting with potential donors, and when you can achieve that level of enjoyment in the midst of estate planning, something is going right.

Due to the number of years in partnership together, many people have been exposed to the program for a second and third time. The success of the program has brought in additional endowments for a learning center with an expectation for even greater expansion in the future.

There are five main reasons for the success of the program at UnityPoint:

1. The process is confidential.
2. Potential donors in need of additional estate planning benefit from the program, giving them an added value.
3. The associate puts everyone at ease with the process, making buy-in a smooth transition.
4. UnityPoint's reputation has been elevated in the community as a leader among nonprofits, benefiting all who rely on the services they provide.
5. The program adds zeros and commas to the bottom line.

Ultimately, the goal is to expand the health system's resources to fund current and future programs. To that end alone, Thompson & Associates' services have been a resounding success.



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### PERCENTAGE OF DONORS WITH A GIFT IN THEIR ESTATE:

TO UNITYPOINT

TO ALL CLIENTS

**< 3%**

**BEFORE**  
planning with  
Thompson &  
Associates

**> 85%**

**AFTER**  
planning with  
Thompson &  
Associates

**4%**

**BEFORE**  
planning with  
Thompson &  
Associates


**61%**

**AFTER**  
planning with  
Thompson &  
Associates

#### CONCLUSION

Some nonprofits believe that they do not have enough prospects to justify working with Thompson & Associates, but UnityPoint's approach is to focus on buying into the process and keeping their planning schedule full. If Thompson & Associates can get in front of donors, no matter how many prospects are available, there will be positive results. There is definitely work involved for the nonprofit to help with finding prospective donors, but once that rhythm is established, Thompson & Associates is able to increase the number of planned gifts exponentially.

The UnityPoint story is one of great success because both teams worked together to create it. Don became an advocate and partner for Thompson & Associates, and it has benefitted the foundation greatly as you can see above.



*“We frequently hear laughter coming from the room. If you can do that during estate planning, you’re doing something right.”*

**DON IRELAND-SCHUNICHT**

Senior VP, UnityPoint Health  
Des Moines Foundation