Rheumatology Research Foundation
Brand Launch Plan

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Executive Summary

The ACR Research and Education Foundation recently completed a two-year brand strategy project that resulted in a defined strategic brand platform, new name, tagline and logo. This plan outlines the tactical approach to a successful launch of the Rheumatology Research Foundation identity with accompanying tagline "Advancing Treatment. Finding Cures."

The plan is divided into three phases and runs from April 2012 – April 30, 2013 and takes a themed communications campaign approach—"What's in a Name?"—to build suspense and excitement around the upcoming change.

Phase I: Teaser Previews to Key Constituents

The first phase kicks off in October with "teaser" communications to VIP donors, both rheumatology community and lay, and current award recipients simply saying "What's in a Name? The answer comes soon." The creative for this phase will integrate the new visual identity of the brand but will not include the new logo. Closer to the ACR/ARHP Annual Meeting, select key constituents will receive a formal invitation to a special event scheduled before the annual meeting Opening Lecture for the official unveiling of the new identity.

Phase II: Official Unveiling at ACR/ARHP Annual Meeting and "Flipping the Switch"

The height of the "What's in a Name?" campaign happens at annual meeting with a private unveiling of the new name at the VIP event preceding the Opening Lecture. The celebration will continue with a public unveiling during the Opening Lecture, as well as at other key events during the annual meeting. In addition, communications will include graphics and promotional materials featuring the new identity.

The public relations department will conduct outreach to trade and lay media with whom the REF currently has relationships (including key, influential patient bloggers) to alert them to the name change and to offer interviews with REF leadership about how this will help further the Foundation's mission. Additionally, they will use the name change—along with exciting research news (e.g., upcoming clinical trials)—to help the REF develop a plan to expand its relationships with different media outlets.

While communications at the annual meeting will be directed mainly to the rheumatology community, the new identity will also be announced online and through other public channels, and through tailored communications to key lay constituents.

On November 10, 2012, all communications, the website and print materials will use the Rheumatology Research Foundation logo. After the official changeover, we will continue to educate key rheumatology community constituents of the change through April 30, 2013. From November 10, 2012 to April 30, 2013, communications will include a "formerly the ACR Research and Education Foundation" message.

Phase III: Rheumatology Community Transitional Phase; Announcement to Lay Community at Large

During the Transitional Phase, we will be working heavily on reinforcing the new identity, reminding current award recipients to use the new logo, and focusing more on communications to the lay community and other interested parties.

Because the annual meeting is for rheumatologists and media specific to the community, the development department has determined that a general announcement to lay constituents is more appropriate in December.

The plan will be evaluated by best-case, most-likely, and worst-case scenarios. While we aim to clearly articulate the new strategic brand platform, and the reason for the name change, it is likely staff and leadership will receive a relatively small number of questions from donors and members. To that end, the plan includes a Frequently Asked Questions document on page 9 as a guide.

I. Goal

The goal is to successfully launch the new Rheumatology Research Foundation identity.

II. Objectives

- To ensure that all stakeholders are aware of and understand the change
- To ensure that the new identity is presented clearly, consistently and positively
- To set a benchmark for brand dashboard

III. What's in a Name? The Story of the New Brand

To facilitate clarity of mission to a broader national audience, the American College of Rheumatology Research and Education Foundation is changing its name to the Rheumatology Research Foundation, with the accompanying tagline "Advancing Treatment. Finding Cures." The change goes into effect November 10, 2012.

Building on more than 25 years of success, the Foundation works in collaboration with the American College of Rheumatology, an international professional medical society that represents more than 8,000 physicians, scientists and health professionals devoted to the study and treatment of rheumatic diseases, to lead the effort to ensure that rheumatology keeps pace with its rapidly growing challenges by cultivating the physicians, treatments and cures needed to care for those whose lives are touched by rheumatic disease.

Each word in the new name has significance; not only to us, but to the people we serve:

Rheumatology: Working in conjunction with the American College of Rheumatology, the Rheumatology Research Foundation is the only national foundation focused on advancing rheumatology research and training to improve the health of people with rheumatic diseases.

Research: Without bright minds dedicated to research, dramatic advancements in rheumatic disease care will cease. The Rheumatology Research Foundation directly invests in an extensive peer-reviewed grants program to recruit and train future rheumatologists and rheumatology educators; develop future researchers and foster their novel ideas; and accelerate research focused on inflammatory rheumatic disease, leading to discoveries and possible cures.

Foundation: Established in 1985 as a 501(c)3 organization, the Rheumatology Research Foundation mobilizes support from the patient, corporate and rheumatology communities with remarkable efficiency in directing donor dollars to its mission and has received a consecutive 4-star rating from Charity Navigator, America's largest and most-utilized independent evaluator of charities. On average, ninety cents out of every dollar raised is invested directly in programs that have the most impact on advancing research and training to improve the health of people with rheumatic diseases.

The evolution of the REF into the Rheumatology Research Foundation marks a new and exciting era as we aim to increase our capacity to fund the best and brightest in the field. The new name and tagline will allow us to more easily share our mission with the rest of the country, bringing more people together to advance treatments and find cures.

IV. How to Use the New Name

To make it more consistent among all foundation audiences we would like everyone to begin referring to the organization with the full name rather than trying to apply an acronym or other nickname that will not be understood. We are suggesting that leadership use the following suggestions for referring to the foundation.

- First reference: Always begin by introducing the organization with the full name "**Rheumatology Research Foundation**." This eliminates the need to further explain a nickname and it does not presume the audience knows exactly who we are.
- Second reference: Once the full name has been used, it is appropriate to begin to refer to the organization as **"the Foundation."** This refers back to the first reference and does not confuse the audience that you are now talking about another organization.
- Avoid using acronyms (REF, RRF, etc.): The foundation has spent a great deal of time and effort creating this new name and brand. Each word was selected for a specific purpose and if we can refrain from using an acronym it will be easier to convey our brand in every conversation.

V. Target Audiences

Donors

- ACR/AHRP Members
- Lay
- Corporate
- ACR/ARHP Prospects

Award Recipients

- Current
- Past
- Prospective

Other Stakeholders

- NIAMS and other agencies
- Competitors
- Media, Trade Magazines
- Combined Federal Campaign, Matching gifts program, Network for Good, third-party evaluators

VI. Marketing Tactics and Timing

Phase I: Teaser Previews to Key Constituents

Vehicle	Audience	Message	Timing
Website	All	Banner ad on website to complement themed communications approach and other teaser communications	Early September
House ad in TR and both journals	Rheum	Themed Teaser ad	Mid-September
e-Communications	Award Recipients, donors, Patients and Families of Progress	Promote opening lecture at ASM	Mid-September
Direct Mail	Award Recipients, donors, Patients and Families of Progress	Themed Teaser postcard sent to VIP contacts	Early September
Dues Insert	All renewing members	Themed teaser concept	
PATHWAYS e-newsletter	PATHWAYS subscribers (lay)	Themed Teaser ad	October 16
Direct Mail	Award Recipients, donors, Patients and Families of Progress	VIP invitation to Launch Event prior to Opening Lecture	Early October
House ad in TR and both journals	Rheum	Themed Teaser ad	Mid- October
Direct Mail	Annual Meeting Registrants	Themed teaser postcard promoting Opening Lecture	Mid-October
Social Media	All	Themed teaser postings on all foundation social pages	October
Outreach to Trade Media	Trade publications	Answer to the question: "What's in a Name?" – Information would be embargoed until annual meeting	October
e-Communications	Award Recipients, donors, Patients and Families of Progress	Promote opening lecture at ASM	Mid-October

Phase II: Announcement at Annual Meeting/Flip the Switch

Vehicle	Audience	Message	Timing
Social Media	All	Answer to the question: "What's in a Name?"	November 10
Website	All	Updated with new brand identity	November 10
e-Communications	All members	Answer to the question: "What's in a Name?"	November 10
VIP Unveiling at Booth	VIP invites (seating), all other interested attendees (standing room)	Answer to the question: "What's in a Name?"; booth graphics will have new identity	November 10 at 3:30pm
Public Unveiling Opening Lecture	Attendees	Formal presentation to answer to the question: "What's in a Name?"	November 10 at 4:30pm
Awards Luncheon, Donors of Merit and 5K Walk/Run Celebration	Attendees	Name change announcement at these events as part of formal program	Various
Daily News House Ads and feature article on Sunday	Attendees	Answer to the question: "What's in a Name?"	November 11
House ads in TR and both journals	Rheum	Answer to the question: "What's in a Name?"	November 15
Ribbons/Pins	Foundation Leadership, volunteers, award recipients, staff and other VIP	What’s in a Name teaser badge	November 10 – 14
Booth Giveaway - Pens	All	New identity	November 11 – 14

Phase III: Rheumatology Community Transitional Phase; Announcement to Lay Community at Large

Vehicle	Audience	Message	Timing
Direct Mail	Lay (J2C Current Donors)	Formal announcement to follow-up from teaser postcard	October
Direct Mail	Awards & Grants accepted applicants (rejected applicants get letter of explanation with REF logo)	Awards & Grants contracts with new logo/letter with reminder of change	November December
Direct Mail	Rheum (will be segmented and messaging will be nuanced appropriately for each group).	Traditional solicitation will include brand identity reinforcement as follow up to ASM announcement	November
Direct Mail	All appropriate lay audiences	Solicitation: renew/acquisition with appropriate messaging announcing the name change	November
Direct Mail	Lay (past WOR donors)	Formal announcement (follow-up from teaser postcard)	November
Direct Mail	Patients & Families for Progress members/Coffee & Conversations Attendees	Formal announcement (follow-up from teaser postcard)	December
e-Communications	All past award recipients	Reminder to use new logo on all presentations / acknowledgments	December
Website	All	Reminder of upcoming change	December
Direct Mail	Matching gift programs	Formal announcement of name change; assess and update organizations and companies currently on our radar for matching gifts; update with information; expand relationships as appropriate	December
Direct Mail	Award Recipients, donors, Patients and Families of Progress	New brand identity	January
e-Communications	All	New brand identity	January
PATHWAYS e-newsletter	PATHWAYS subscribers (lay)	Updated with new brand identity	January 1
House ad in TR and both journals	Rheum	Page created with new brand identity	January 1
Face-to-Face	Past Donors, Patients and Families for Progress, J2C Donors, PATHWAYS subscribers, COH Prospects	Formal presentation of new name, new brochure but same mission	January

VII. Evaluation and Deliverables

This plan will be evaluated by best-case, most-likely, and worst-case scenarios.

Best-case Scenario: By all accounts, donors and members understand and support the name change, and no negative comments are received.

Most-likely Scenario: The majority of donors and members understand and support the name change, and a relatively small number of questions and negative comments are received.

Worst-case Scenario: The majority of donors and members do not understand and support the name change, a relatively large number of question and negative comments are received.

Deliverables

- Baseline metrics for Brand Dashboard
- Market research plan to inform Brand Dashboard moving forward; draft of plan outlined in Appendix B

VIII. Potential Questions - UPDATED

Q: Why is the REF changing its name?

A: We started first with an overall branding project to better understand how we are different from other foundations. Through the research in this project, we found the name to be a significant barrier to recognition among the patient community. Knowing we need to expand our reach outside the membership, we decided to change our name so we can more easily share our mission with the rest of the country.

Q: Is the REF still a part of the American College of Rheumatology?

A: Absolutely. The Foundation is not separating from the ACR.

Q: How did you choose Rheumatology Research Foundation?

A: As a continuation of the original branding project, we conducted naming research to determine what words resonated with the patient community but still conveyed the mission of the Foundation.

The word "Rheumatology" is now a prominent part of our name, indicating our dedication to supporting the field through research and training programs. So, our activities are not changing. We are more clearly articulating who we are and what we do.

Q: Where is Education?

A: While "Education" is no longer a part of the name, it is not the Foundation changing the focus of the awards and grants program. Our activities have not changed. The Rheumatology Research Foundation will continue to provide awards and grants directed at encouraging promising candidates to enter the field, supporting career development, and providing training opportunities for rheumatology clinicians, researchers and health professionals.

The word "Rheumatology" is now a prominent part of our name, indicating our dedication to supporting the field.

Q: When does the new name go into effect?

A: The REF officially becomes the Rheumatology Research Foundation on Saturday, November 10, 2012, with the official public unveiling at the Opening Lecture during the ACR/ARHP Annual Meeting.

Q: How will the new name affect the *Journey to Cure* campaign?

A: The new name will allow the Foundation to reach a wider audience with our message so the *Journey to Cure* campaign will continue as planned with rebranded materials. What is different is the money raise through the campaign will fund t.

Q: Apart from the new name and logo, what else is happening?

A: The Foundation has also expanded the disease targeted research program. Now, researchers focusing on other types of inflammatory arthritis are supported through this program.

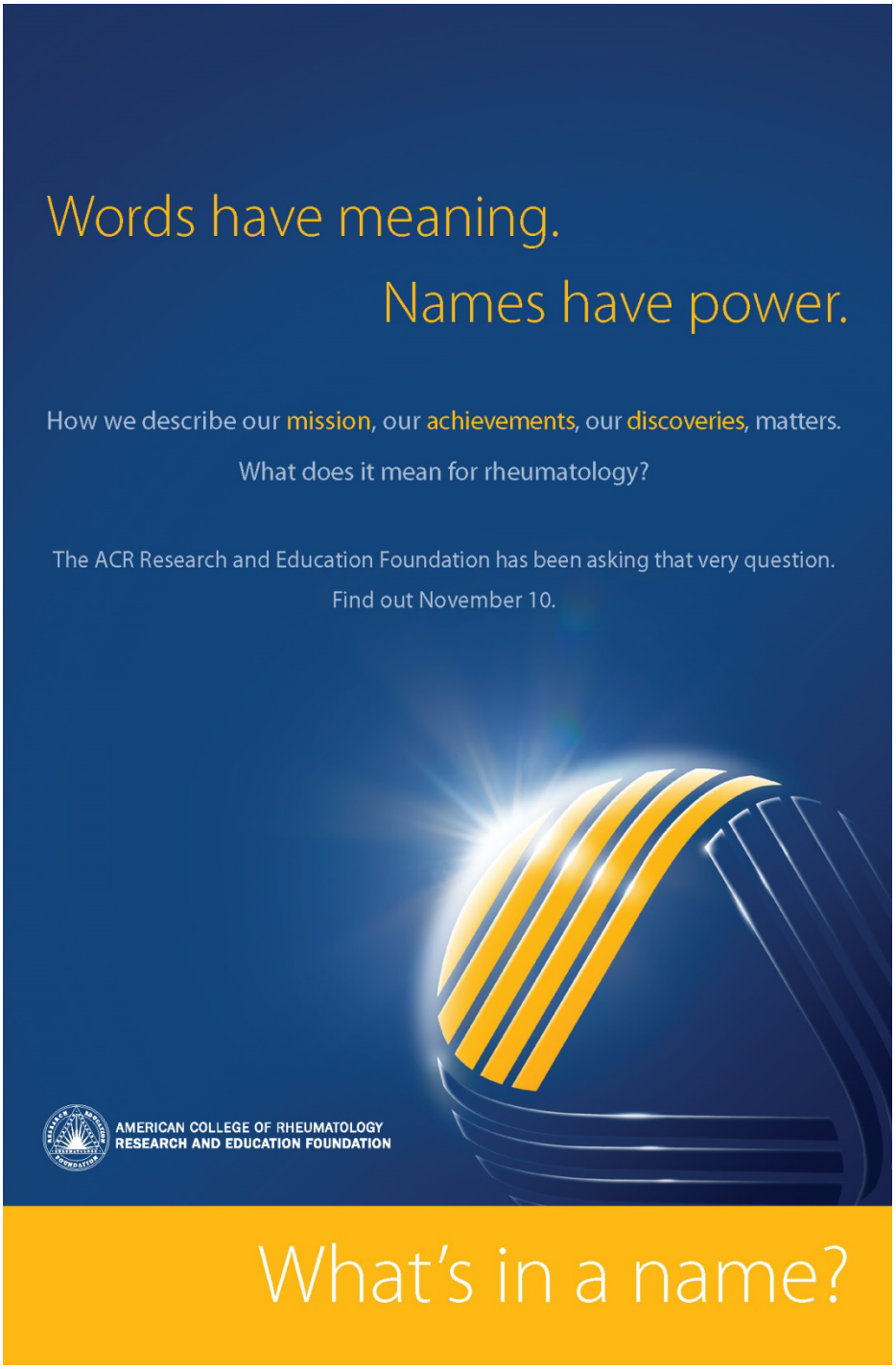
The Foundation experienced many funding milestones this year:

- On July 1, we funded over $12.3 million, the most in our history
  - Over $6 million to Education and Training, and Career Development awards
  - $6.3 million to the disease targeted grants initiative, including $2 million to the new clinical trial grants

REF PRODUCT/Audience	July Sept	August Oct	September Annual Mtg Nov	October Dec	November Winter Rheum Jan 2013	December Feb 2013	January March 2013	February SOTA April 2013	March May 2013	April June 2013
Print Ad Schedule										
What's in a Name? Campaign	TR - Mystery Teaser (mid-month)	TR - Hint (mid-month	TR - LAUNCH (mid-month)	TR - LAUNCH (mid-month)						
What's in a Name? Campaign	Journals - Mystery Teaser (early month)	Journals -Hint (early month)	Journals -Hint, find out November 10 (early month)	Journals -LAUNCH (early month)						
What's in a Name? Brand Announcement			Daily News, PB							
New Identity Ad - General Awareness					TR - New Identity	TR - New Identity	TR - New Identity	TR - New Identity	TR - New Identity	TR - New Identity
New Identity Ad - General Awareness					Journals -New Identity	Journals -New Identity	Journals -New Identity	Journals -New Identity	Journals -New Identity	Journals -New Identity
New Identity Ad - General Awareness					Symposia Syllabi		Membership Directory	Symposia Syllabi		
JTC Giving Message		House Ad - TR	House Ad - Journals							
5K Run - as REF			Daily News, PB							
Gout Prints with new identity messaging			Daily News							
Direct Mail Schedule										
What's in a Name? Teaser to **Award Recipients, donors, volunteers**	Postcard (early month)	VIP invitation (early month)								
Donors' of Merit Event		Invite teasing special announcement								
Awards Luncheon		Invite teasing special announcement								
What's in a Name? Teaser promoting announcement at Opening Lecture - **annual meeting attendees; U.S. only**		Postcard (mid-month)								
What's in a Name? Teaser with Giving Call to Action		Dues Renewal (mid-month)								
What's in a Name? Brand Announcement			Postcard to Lay Donors							
What's in a Name? Brand Announcement with Giving Call to Action					Dues Renewal					
Core Grants CFA - reinforce new identity								Brochure		
Preceptorship CFA - new identity										
E-Communication										
What's in a Name? Teaser to **Award Recipients, donors, volunteers**		E-mail teasing special announcement								
What's in a Name? Campaign - general membership (non-annual meeting attendees and VIP event attendees)			E-mail on November 10 - announcement							
Identity - General Awareness				Morning Wire	Morning Wire	Morning Wire	Morning Wire	Morning Wire		
Core Grants CFA									Blast E-mail	

REF PRODUCT/Audience	July Sept	August Oct	September Annual Mtg Nov	October Dec	November Winter Rheum Jan 2013	December Feb 2013	January March 2013	February SOTA April 2013	March May 2013	April June 2013
Core Grants CFA									Morning Wire	
Preceptorship CFA										
WOR Grants RFP										
WOR Grants RFP										
5K Run Past Particpants										
Rodnan Prints										
Website and Social Media Nov. 10 - www.rheumatology.org/foundation										
What's in a Name? Teaser	Button - link to new page	Button - link to new page								
What's in a Name? Teaser	FB & Twitter - link to new page	FB & Twitter - link to new page								
What's in a Name? Brand Announcement			Video - pop up upon entry	Video - pop up upon entry						
What's in a Name? Brand Announcement			FB & Twitter - link to website/video	FB & Twitter - link to website/video						
New Identity Ad - General Awareness					Rotator - link to new page	Rotator - link to new page	Rotator - link to new page	Rotator - link to new page	Rotator - link to new page	Rotator - link to new page
JTC Giving Message					Rotator	Rotator	Rotator	Rotator	Rotator	Rotator
JTC Giving Message					FB & Twitter - link to website /awards/index	FB & Twitter - link to website /awards/index	FB & Twitter - link to website /awards/index	FB & Twitter - link to website /awards/index	FB & Twitter - link to website /awards/index	FB & Twitter - link to website /awards/index
Core Awards & Grants									Rotator	Rotator
Core Awards & Grants									FB & Twitter - link to website	FB & Twitter - link to website
Preceptorship										
DTRI Grants										
Media Outreach Schedule										
New Identity - Announcement		Press outreach	Press Release							
Funded research	Press Release	Press Release	Press Release	Press Release	Press Release	Press Release	Press Release	Press Release	Press Release	Press Release
Leadership Announcements			Press Release							
Collateral Material										
Acknowledgement Booklet			REF Booth & Donors' Lounge Insert in Daily News							
Supplement Booklet										
Supplement Booklet			Insert in TR							
Annual Report - reinforce milestones and new identity					/annualreport/index					

Teaser ad in *The Rheumatologist;* copy and creative reused in direct mail postcard to VIP constituents.



The **ACR Research and Education Foundation** is now the

Rheumatology Research Foundation
Advancing Treatment | Finding Cures

Words have meaning.
Names have power.

Thanks to you, the Foundation is recognized as the largest private funding source of **rheumatology** training and research programs in the United States.

Our new name more clearly conveys our identity, allowing us to strengthen our bonds to the ACR community while offering exciting opportunities to introduce our **mission, achievements** and **discoveries** to a new audience—patients and families who care about uncovering the causes, advancing treatment and finding cures for rheumatic diseases.

What's in a name?

Reveal ad in *The Rheumatologist;* copy and creative carried over to website

AMERICAN COLLEGE OF RHEUMATOLOGY
RESEARCH AND EDUCATION FOUNDATION

Words have meaning.
Names have power.

How we describe our **mission**, our **achievements**, our **discoveries**, matters.

What does it mean for **rheumatology**?

The ACR Research and Education Foundation has been asking that very question.

Find out Saturday, November 10 during the Opening Lecture and Awards.

What's in a name?

Teaser ad in *Daily News* which promoted onsite unveiling event.

The **ACR Research and Education Foundation** is now the

Rheumatology Research Foundation
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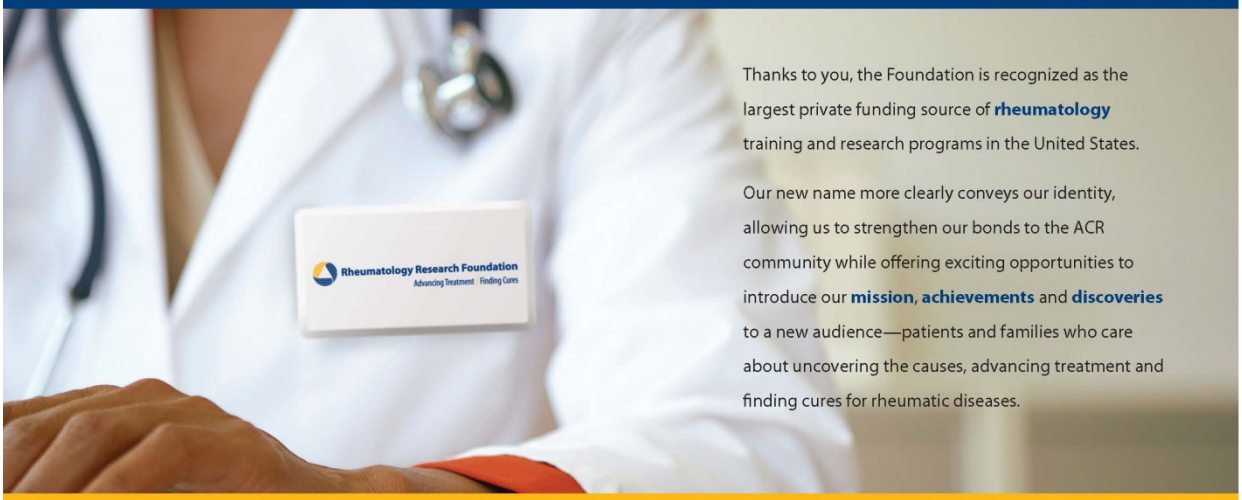

Thanks to you, the Foundation is recognized as the largest private funding source of **rheumatology** training and research programs in the United States.

Our new name more clearly conveys our identity, allowing us to strengthen our bonds to the ACR community while offering exciting opportunities to introduce our **mission**, **achievements** and **discoveries** to a new audience—patients and families who care about uncovering the causes, advancing treatment and finding cures for rheumatic diseases.

Visit the booth on the L Street Bridge (Level 2) to learn more about the Rheumatology Research Foundation's mission, achievements and discoveries, or visit www.rheumatology.org/Foundation.

Half-page reveal second section of *Daily News* with call to action to visit booth.

Rheumatology Research Foundation ushers in new name and a new era

What's in a name? Attendees at Saturday's opening lecture found out as the president of the American College of Rheumatology Research and Education Foundation announced that the 27-year-old fund-raising arm of the ACR has changed its name to the Rheumatology Research Foundation.

"Our new name is the first step on a shared journey to a brighter future as we aim to increase our capacity to fund the best and brightest in rheumatology," said Foundation President David Daikh, MD, PhD, with the organization's new logo, blue and gold color scheme, and tagline, "Advancing Treatment, Finding Cures," flashing behind him.

While it remains an integral part of the ACR, the Foundation's new brand propels it toward new efforts to expand its reach beyond the professional community to include patients and families who care about uncovering the causes, advancing treatment, and finding cures for rheumatic diseases, as well as strengthening the field of rheumatology through research and education.

"The ACR established the Research and Education Foundation in 1985 as a way to raise funds to support people developing careers as rheumatologists and in research," said Dr. Daikh, Associate Professor of Medicine at the University of California, San Francisco.

Rheumatology Research Foundation
Advancing Treatment | Finding Cures

"The Foundation is recognized as the largest private funding source for rheumatology research and education. We've entered an exciting and challenging era as we gain new knowledge about rheumatic diseases that could open the door to promising new treatments with the potential to impact the lives of millions." – Foundation President David Daikh, MD, PhD

At the time, a handful of ACR officers managed a modest portfolio of $100,000 each year. Exponential growth followed. For fiscal year 2013, the Foundation has committed to funding more than $12 million in awards and grants, including $2 million for investigator-initiated clinical trials.

In addition, the Foundation has expanded its disease-targeted research initiative to include a broader range of rheumatic diseases. While rheumatoid arthritis remains an important focus, the Foundation has expanded these research grants to include other conditions where inflammatory arthritis is the major pathology, including the spondylarthropathies and juvenile idiopathic arthritis. These grants — totaling $3.1 million — are designed to produce outcomes that lead to new insights into the etiology, pathogenesis, and treatment of these diseases, which will, in turn, lead to improved care and treatment for patients.

Building on its successful $30 million *Within Our Reach* campaign, the Foundation launched the ambitious, five-year *Journey to Cure* campaign in 2011. Dr. Daikh said the Foundation is already more than halfway to its $60 million goal.

"The Foundation is recognized as the largest private funding source for rheumatology research and education," Dr. Daikh said. "We've entered an exciting and challenging era as we gain new knowledge about rheumatic diseases that could open the door to promising new treatments with the potential to impact the lives of millions."

The Foundation's new branding efforts were kept under wraps quite well. The first public unveiling — for a group of two dozen VIPs packed into the Foundation's booth — came less than an hour before Dr. Daikh took the stage at the opening lecture.

Exhibit Hall opens today

Accompanying feature article that ran on inside front cover of *Daily News*.