

**REQUEST FOR PROPOSAL:  
CAMPAIGN PLANNING STUDY**

**A. Introduction**

The Rheumatology Research Foundation requests proposals from qualified consulting firms to work with the Foundation's Executive Committee and Senior Management Team to conduct a campaign planning study to assess the fundraising potential of the Foundation to support programmatic costs of \$25-\$35 million per year over the next five to 10 years.

**B. Background**

The Rheumatology Research Foundation is a 501(c)3 organization, serving on behalf of the American College of Rheumatology, which is an international professional medical association that represents more than 9,000 physicians, scientists and health professionals devoted to the study and treatment of rheumatic diseases. The mission of the Foundation is advancing research and training to improve the health of people with rheumatic diseases. Established in 1985 - and celebrating its 30th anniversary in 2015 - the Foundation is the largest private funding source of rheumatology research and training programs in the United States. The Foundation has experienced exponential growth in the size of its program over the past ten years, and has nearly doubled in the past five years alone, with its largest program budget to-date totaling \$13,198,500 in FY2016.

In November 2011, after successfully completing over goal the Foundation's first \$30 million major gifts campaign, the Foundation launched a new \$60 million comprehensive campaign, called *Journey to Cure*, to encompass funding of the Foundation's peer-reviewed biomedical research and training grants portfolio, with an estimated time-frame of 60 months to end in June 2016. After 48 months, the *Journey to Cure* campaign has raised to-date \$55,184,995 (92% of goal).

Anticipating the end of the *Journey to Cure* campaign in the next 12-14 months, coupled with the end of the Foundation's current Strategic Plan, in April 2015, the Foundation Board of Directors completed a long-range planning exercise to guide organizational goals through 2025. The long-range plan includes overarching organizational priorities, and based on the information and recommendations contained within the long-range plan, the Board will evaluate future priorities to inform the next Strategic Plan and future projects. Before endorsing a growth model, the Foundation Board of Directors would like to assess fundraising potential moving forward.

**C. Scope of Services**

1. Conduct a campaign planning study and produce a written report assessing the feasibility of the fundraising goal, including, but not limited to:
  - a. Assess perceptions of the Foundation and inform participants of the proposed plan;
  - b. Determine reactions and advice concerning a proposed campaign;
  - c. Test proposed new campaign goal of \$150,000,000;
  - d. Identify potential leaders and financial prospects to lead and support the campaign;
  - e. Identify potential issues and obstacles to success; and
2. Provide a written outline of a preliminary campaign plan and timetable.

**D. Submission Requirements**

1. **Qualifications and Related Experience:** Supply a brief history of the firm, including size, areas of expertise, key personnel, and any other pertinent information as it relates to the project. Provide evidence of related experience, including a description of at least two other projects which demonstrates the firm's ability to complete projects of this type. What makes your firm the "right fit" and what sets you apart from other candidates?
2. **Project Approach & Deliverables:** Describe the approach that your firm will take to provide the services described in Section C. Describe the deliverables and outcomes your firm will provide. Describe your planning study process. Include how many interviews you will conduct; how you identify who to interview, and what information and recommendations will be included in the Planning Study Report. What distinguishes your processes and approach from those of others?
3. **Timeline:** Provide a specific timeline for the completion of the services described in Section C.
4. **Expectations of Staff and Board:** Describe your expectations of staff and volunteers/board members. Identify information, space needs, and collateral materials that your firm will require.
5. **Fee Proposal:** Provide a fee proposal with supporting details. Describe any costs your firm will not cover.
6. **References:** Provide a list of three references of past clients on similar projects. Include client name, contact person, address, phone number, and e-mail address.

**Proposal Submission:**

Proposals may be submitted via email, or U.S. mail. If by email, attach proposal in pdf format only:

Email: [preed@rheumatology.org](mailto:preed@rheumatology.org)

Rheumatology Research Foundation  
ATTN: Campaign Planning Study RFP  
c/o Paula J. Reed  
2200 Lake Boulevard NE  
Atlanta, GA 30319

**Schedule:**

08/12/15: Release of Request for Proposals  
09/11/15: Proposals due  
09/21/15: Top candidates selected  
10/04/15: Top candidates in-person interviews  
11/06/15: Finalist Selected  
11/09/15: Finalist notified of selection

**Contact:**

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