Arthritis Foundation Strategic Plan

ARTHRITIS FOUNDATION®

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Executive Summary

Over the past five years, the Arthritis Foundation has transitioned to a unified organization that has the capacity to better carry out its mission throughout the United States. To capitalize on this capacity, since May 2010 the Arthritis Foundation has undergone a strategic planning process that has involved extensive input from Arthritis Foundation board members, staff and volunteers at the national, regional and local levels. It has also benefited from input from leaders in academic and clinical medicine, public health, public and private sector funding, and organizations with arthritis-related missions who offered a national or international perspective on the Arthritis Foundation's opportunities to achieve major impact.

The resulting plan provides a framework for action that includes the following key elements:

- The Arthritis Foundation will become the leader of a national movement to improve the lives of people with arthritis and to transform the way our society responds to the disease. In this capacity, the Arthritis Foundation will:
  - **Influence** systemic change
  - **Partner** with people and organizations to expand capacity and reach
  - **Mobilize** the resources and people needed to succeed

  Drawing attention to this role, the Arthritis Foundation will rebrand itself in a way that is compelling to potential supporters and that enhances its capacity for influence.
- The high-level goal will be to achieve, by the year 2030, a 20% reduction in the number of people who have freedom of movement stolen by arthritis. Progress toward the goal will be tracked on the basis of reports on arthritis-associated activity limitations (AAAL) produced regularly by the Centers for Disease Control and Prevention. Success will involve improved arthritis preventions, treatments and, ultimately, cures.
- The Arthritis Foundation will lead an aggressive effort to **"make arthritis unacceptable,"** to create greater urgency and investment in addressing arthritis and to promote an agenda for change.
- The Arthritis Foundation will become the nation's lead organization in ensuring that people with arthritis have the knowledge, skills and resources they need to be proactive in improving their health and quality of life.
- The Arthritis Foundation will drive a strategic research agenda that guides and accelerates progress toward prevention and cure of osteoarthritis, rheumatoid arthritis and juvenile arthritis. It will act as an international convener to align efforts in support of this agenda and target its own funding to achieve greatest impact.
- The Arthritis Foundation will provide national leadership in advocating for public and private sector policies and strategies that produce better outcomes for people with arthritis.
- The Arthritis Foundation will catalyze national efforts to better serve populations that have a high burden of arthritis and experience disparities in health and health care.
- The Arthritis Foundation will significantly increase its funding support by: developing a strong major gifts program that involves all levels of the Arthritis Foundation – national, regional and local – working in concert; developing "strategic grant partnerships" with institutional donors focused on key Arthritis Foundation strategies; and bringing increased urgency to special events and broad-based appeals.

Becoming a Cause Leader and Rebranding the Arthritis Foundation

Causes are among the most transformative forces in our society. They connect with the desire within each of us to serve others, and they generate the will and resources to accomplish great progress. Causes focus on impact – the impact of improving individual lives and the broader impact of creating a better community, a better country, or a better world. They spring from powerful ideas that challenge the status quo.

The Arthritis Foundation will become the leader of a movement to achieve major progress for people with arthritis and transform the way our society responds to arthritis. It will

assume responsibility for a measurable goal, but work with many partners that share an interest in the result and can make major contributions to its attainment.

Serving as a cause leader will brand the Arthritis Foundation as a bold, visionary organization that is focused on results and is indispensible to changing the status quo. By providing clarity of purpose – a measurable goal supported by specific strategies – the Arthritis Foundation will motivate and guide others in making significant contributions.

There is a need and opportunity for the Arthritis Foundation to become the cause champion for people with arthritis. No other organization has committed to challenging the status quo and achieving a major, defined improvement in the lives of the millions of people in this country who have, or are at risk of developing, arthritis.

In taking on this role, the Arthritis Foundation will build on an impressive record of strategic impact. For example, it led campaigns to establish a focus on arthritis within the National Institutes of Health (NIH) and the Centers for Disease Control and Prevention (CDC). It has led advocacy for federal legislation to improve the lives of people with arthritis. The Arthritis Foundation partnered with the CDC to lead development of the National Public Health Agenda for Osteoarthritis, and played a critical role in creating major new capacities such as the Childhood Arthritis Rheumatology Research Alliance (CARRA) and the Alliance for Lupus Research (ALR). For many years it has served as the nation's leading arthritis communicator, and over its history has been the largest private funder of arthritis research in the world. Going to the next level will involve:

- pursuing a well-defined goal;
- working strategically on greatest opportunities for impact;
- being at the forefront of communications, advocacy and resource development;
- expanding impact through partnerships that encompass all the sectors needed to succeed; and
- taking responsibility for results.

The High-Level Goal

The Arthritis Foundation's cause is to eliminate arthritis as the leading cause of disability in this country. That cause will focus on a measurable goal that represents a commitment for which the Arthritis Foundation and its partners will be accountable. The goal must be realistic as well as ambitious, time-limited, expressed with clarity, and deal with the scope of the problem and the nature of its impact.

The Arthritis Foundation's goal is aimed at reducing the number of people who have arthritis-related physical limitation in the United States:

> If current trends continue, by 2030 arthritis will rob more than 30 million Americans of their ability to move freely. We will catalyze a movement to reduce that number by 20 percent, preserving the health and quality of life of 6 million people.

The Centers for Disease Control and Prevention measures the extent of arthritis-associated activity limitations (AAAL) at the national and state levels, providing highly credible, independent progress reports. The CDC also measures the impact of arthritis on the nation's workforce, allowing the Arthritis Foundation and its partners to make a powerful economic as well as moral argument for changing the status quo.

Impact Objectives

To achieve the high-level goal, the Arthritis Foundation will pursue five impact objectives that involve:

- Influencing systemic change
- Partnering with people and organizations – throughout the Arthritis Foundation as well as externally – to expand capacity and reach
- Mobilizing resources and people needed to succeed

Diagram 1: Arthritis Foundation Impact Objectives

Influence Change	Partners	Mobilize Resources
Impact Objective 1: Make arthritis unacceptable.	Engage Arthritis Foundation communications at all levels in advancing shared messages and an agenda for change.	Build involvement in the cause via advocacy, events, fundraising appeals, media relations, consumer information.
Impact Objective 2: Provide universal access to the knowledge, skills and resources people need to minimize the impact of arthritis in their lives.	Engage health care providers, employers, health promotion organizations and others in both high-reach and high-touch efforts to improve lives.	Mobilize funds and capacity to create broader reach and meaningful engagement that helps people adopt and maintain healthy behaviors.
Impact Objective 3: Drive a strategic research agenda that achieves major benefits for people with OA, RA and JA.	Align researchers, clinicians, industry, funders, policymakers and patient groups around a shared research agenda.	Mobilize public and private funding as well as societal alignment around goals and strategies that offer major benefits for people with arthritis.
Impact Objective 4: Influence policies and strategies to produce better outcomes for people with arthritis.	Partner with federal and state agencies such as CDC, NIH, AHRQ, FDA and other health policy entities, state public health departments, healthy communities efforts and industry.	Mobilize support for public and private policies that support arthritis prevention, innovation and access to quality care.
Impact Objective 5: Reduce arthritis-related disparities in health and health care.	Collaborate with local entities and national partners such as the National Alliance for Hispanic Health, African-American Churches, Office of Minority Health in HHS and the NIAMS Disparities Initiative.	Create greater capacity to assist underserved populations that have a significant arthritis burden.

Impact Objective 1:
Make arthritis and its associated limitations unacceptable.

A major objective of the strategic plan is to make arthritis and its associated limitations unacceptable. This will involve adding a new tone to Arthritis Foundation communications, one that urges action to change the status quo.

Deliverable

Build broad support for an agenda for change, led by the Arthritis Foundation.

Tactical Approach

The Arthritis Foundation will announce, and continually communicate, an agenda for change. The announcement will be timed and coordinated throughout the Arthritis Foundation in order to achieve maximum attention, and then consistently promoted through a broad array of communications vehicles, including the Web, print media, events, broad-based and targeted fundraising appeals, advocacy efforts and media relations.

The focus of the agenda will be:

1. The impact goal

- What the target is and how it is measured
- Why it is important (how the goal relates to impact on individuals, their families and society)
- Where things stand toward achieving the goal

2. The core arguments for changing the status quo

- Arthritis causes pain that literally steals people's ability to live the lives they want – with their families, their work and their interests. And it exposes them to other serious illnesses that can shorten their lives.
- Despite the fact that it is the leading cause of pain and disability in our society, arthritis is not getting appropriate attention. As a result, it exacts a huge personal and economic toll.
- The status quo is unacceptable.
- It doesn't have to be this way. If we put to work and build on what we already know, we can prevent the harm arthritis causes on such a large scale.

3. The specific societal changes that need to take place in order to succeed, and why those changes offer great promise

- Effective treatments and, ultimately, cures
- Universal healthy physical activity and dietary lifestyles and access to appropriate care in a timely manner
- Supportive public health and clinical policies
- Greater investment

4. Calls to action

Diagram 2: Key Arthritis Foundation audiences and calls to action

Audiences	Calls to Action
Arthritis Foundation volunteers and donors	Lead and support the Arthritis Foundation agenda for change.
People with arthritis and their loved ones	Seek guidance; become physically active; get quality care; support the Arthritis Foundation.
Care and support partners, such as health care professionals who work with arthritis patients, employers, corporations	Work with us to provide the guidance and care people need to minimize the impact of arthritis on their lives.
Research partners	Help us build alignment and support for a goal-oriented, high-impact research agenda.
Policy partners, including elected officials and public health officials (state and local)	Make arthritis a high priority in prevention and research funding, health care reform and public health programming.

5. The Arthritis Foundation's role

- The Arthritis Foundation will brand itself as the leader of this agenda and convey its messages through multiple communications vehicles such as the advocacy program, media relations, publications, public service and/or paid advertising, Web presence, social media, events, broad-based funding appeals, major gift and grant solicitations, and partnership recruitment.

Promoting an agenda for change, with related calls to action, will provide a strong foundation for Arthritis Foundation fundraising. It will underscore the Foundation's unique role as a cause leader, point toward a compelling future that can be achieved with appropriate support, and offer clear options for involvement and investment.

IMPACT OBJECTIVE 2: Ensure that all people with arthritis can access the knowledge, skills and resources they need to be proactive in improving their health and quality of life.

As a chronic disease, arthritis affects peoples' lives over many years and in many ways. At the time of diagnosis, people are often frightened and confused. They have a voracious appetite for credible information to understand their condition, treatment options, what the future might look like, and what steps they can take, beyond treatment, to improve their health and function. Yet, while we live in an era where we are inundated with information, it is often difficult for people to obtain credible guidance on issues that are important to them. Providing sound, personal guidance can have a profound effect on the lives of people with arthritis.

Many people with arthritis also face challenges in obtaining the specialized care they require, and most people need help incorporating physical activities and dietary habits into their lives that can reduce their pain and improve their function.

Deliverable

Establish a nationwide system of guidance and support for people with arthritis that:

1. **maintains an in-depth understanding of what information and support people with arthritis want and need, as well as the capacity to provide assistance in ways that are personalized and culturally responsive.**
2. **engages people with arthritis in appropriate physical activity to improve their health and functioning.**
3. **ensures that people with arthritis have access to the assistance they require in obtaining timely care appropriate to their condition.**
4. **builds strong, lasting relationships.**

This strategy will position the Arthritis Foundation as the nation's lead organization for arthritis guidance – a "doorway" to link individuals with the information, resources and personalized assistance they need. If the Arthritis Foundation is there for people with the relevant guidance at the critical points in their arthritis journey, many will establish a mutually beneficial relationship with the Foundation that will not only improve their own quality of life, but may also lead to sustained volunteerism, advocacy and giving.

Tactical Approach

The Arthritis Foundation will create and manage an infrastructure that includes the following components:

- **The Arthritis Foundation will provide a centrally-managed source of information and support tools to ensure quality, consistency, depth and responsiveness to identified needs.** At the national level, the Arthritis Foundation's Consumer Health program will:
  - Conduct original consumer research, and stay abreast of secondary research sources, to continually assess and monitor our constituency's needs, wants, frustrations and challenges.
  - Determine gaps in meeting consumers' needs, and develop resources and initiatives to meet those needs.
  - Produce and maintain an array of patient education content, tools, resources and programmatic content focused on areas of greatest need, in formats determined to be most desirable and accessible to target constituencies.
  - Create a world class online health information destination with robust content, tools and a portal to deeper engagement online and at the local level.
  - Create materials that describe the Arthritis Foundation's patient support role.

- **Local Arthritis Foundation offices will become "arthritis guidance and information hubs" to offer personalized assistance to individuals within the community.** These will require professional management and volunteer support, and will provide:
  - basic information about arthritis and its treatment;
  - referrals to rheumatologists and/or other arthritis specialists, if needed;
  - connections to community resources, including Arthritis Foundation and other physical activity options, and resources for better living;
  - personalized support to help individuals identify their areas of need and plans of action;
  - referrals to "patient navigation" assistance for individuals who are struggling with barriers to obtaining care; and
  - a strategic follow-up and cultivation process to ensure individuals are receiving the support they need and to move them to deeper levels of engagement with the Arthritis Foundation.

  In support of this role, local Arthritis Foundation offices will:
  - assess the availability of existing community resources to meet constituent needs and support development of new initiatives to fill gaps;
  - support and promote educational and physical activity sessions throughout their geographic area, targeting an array of audiences;
  - conduct or support programs specifically targeting key underserved populations within the community;
  - conduct outreach or programs specifically targeting individuals in the early stages of diagnosis and disease management;
  - offer Arthritis Foundation hosted/branded in-person events, programs or meeting opportunities on a regular basis; and
  - track and report results on outcome measures.
- **The Arthritis Foundation will engage partners to assist the patient guidance function.** These will include health care providers, pharmacies, insurers, employers, health promotion organizations (such as YMCAs), companies with arthritis-related products, professional associations and others that have a strong interest in collaborating with the Arthritis Foundation to improve people's health. They will direct people to the Arthritis Foundation and/or join the Arthritis Foundation in providing information.
- **The Arthritis Foundation will identify "patient navigation" resources to help people obtain the care they need.** The Arthritis Foundation will determine the most feasible way to help people overcome barriers they encounter in accessing care, such as insurance issues, difficulty negotiating our complex health care system, or obstacles related to language or culture. One option may be to partner with one or more organizations that are expert in providing this support, including ones that are fluent in the language and cultures of disparate populations.

Implementing this strategy will involve significant change at all levels of the Arthritis Foundation. However, the benefits will be significant. By creating an individualized guidance component within the system of care for people with arthritis, the Arthritis Foundation will meet a gaping need in our society. It will also provide the direct support most people need to take the difficult step from inactivity to physical activity – a step that must be taken on a large scale in order to achieve the high-level goal.

The strategy will have organizational benefits as well, by creating relationships of value with far more individuals than has been possible to date – relationships that open the door to deeper involvement in the Arthritis Foundation through giving and volunteerism. Just as important, it will provide the most visible, consistent evidence of the Foundation's role as a leader of a movement to improve the lives of people with arthritis.

IMPACT OBJECTIVE 3:
Drive a Strategic Research Agenda that guides and accelerates progress toward OA, RA and JA preventions and cures.

While our nation's system of medical research has enormous strengths, it is not organized to find the fastest path to the greatest benefits for patients. In response, the Arthritis Foundation is working to adopt a new research policy that creates a unified nationwide research program guided by the Arthritis Foundation's Research Strategy Committee. The program is based on the following principles:

1. Invest in research that meets the most compelling needs of patients.

2. Pursue research initiatives that are not likely to be met without significant collaboration.

3. Focus on areas where there is the greatest possibility to exploit scientific opportunities.

> "What if you were in the business of curing a disease — not 'discovery' or 'research,' or of selling a product, but of curing a disease? What would your business model be?
>
> "It probably wouldn't be to create an environment in which the researchers whose work was central to your success pursued their individual interests or career goals and not necessarily yours. Or one in which you were interested in funding only the earliest or latest stages of product development and nothing in the middle.
>
> "But that's effectively the system we have in charge of finding cures for the diseases that affect us all."
>
> *Faster Cures: The Center for Accelerating Medical Solutions*

4. Select research targets that optimize fundraising.

5. Concentrate resources to achieve greatest impact and visibility of research investments.

Deliverable

Catalyze focused nationwide research initiatives that have the potential to transform the lives of people affected by osteoarthritis, rheumatoid arthritis and juvenile arthritis. Expand significantly the training of arthritis investigators.

Tactical Approach

In the new model for research:

1. The Arthritis Foundation will operate a single unified research program guided by the Research Strategy Committee.

2. The Arthritis Foundation will identify and achieve a specific major research goal of transformational nature and magnitude in OA, RA and JA. These goals are large in scale, likely to be multi-institutional in implementation, and require funding from both the Arthritis Foundation and collaborating partners.

3. The three major goals will be supplemented with highly-targeted individual investigator-initiated research projects that extend the impact of the major research goals and take advantage of the resources resulting from these goals.

4. All research projects will be closely integrated with major gifts and general fundraising initiatives carried out by the Arthritis Foundation.

5. The targeted research initiatives will guide efforts to engage partners in achieving the goals of the Arthritis Foundation.

6. The Arthritis Foundation will lead an effort to ensure that the major organizations that provide support for training coordinate their efforts in ways that maximize the effectiveness for production of new arthritis investigators.

Through this approach, the Arthritis Foundation will catalyze and invest in nationwide initiatives in research that, if accomplished, will transform the lives of people affected by osteoarthritis, rheumatoid arthritis and juvenile arthritis. The goals of these initiatives will be as follows:

1. Develop personalized medicine for people with rheumatoid arthritis in the broadest meaning of this term:

- Developing the ability to prescribe the right drug at the right time for each individual patient by identifying reliable predictors of treatment responses.
- Identifying the genetic factors that predispose each individual to the development of RA.
- Determining the environmental factors that initiated the disease in each patient.
- Understanding the implications of each patient's disease for offspring and siblings.
- Optimizing ability to assist patients in understanding the risks and benefits of potential treatments as they apply to each individual.
- Resolving how individual psychological, social and economic factors influence the outcome of rheumatoid arthritis in individual patients.

A key strategy to achieve this goal will be to correlate available clinical, environmental, psychological and genetic information at the time of disease onset with clinical outcome, response to treatment and family data.

2. Develop new interventions for osteoarthritis.
Interventions may include:

- prevention strategies that protect against processes that damage joint tissues;
- new drugs that both treat symptoms and alter the basic course of the disease;
- improved non-medical and non-surgical interventions that prevent joint damage; or
- physical measures that increase resilience of joints.

A key strategy will be to achieve clinically useful tools that permit the assessment of ongoing tissue breakdown and repair. Finding a way to assess the health of joints at a molecular level will place osteoarthritis on a level similar to cardiovascular disease and osteoporosis, where measures of the underlying pathophysiology have promoted treatment interventions. Validating better ways to measure the biological processes that bring about osteoarthritis and resulting joint failure at the earliest stages of the disease will lead to more rapid product development.

3. Define the highest standard of care for juvenile arthritis.
A key strategy will involve working closely with CARRA and others to implement comparative research studies to:

- provide the evidence for best treatments;
- identify patients' short- and long-term risks; and
- understand the biologic basis of disease activity and response to therapy.

The Arthritis Foundation's targeted approach will be supplemented with highly-targeted, investigator-initiated research projects that take advantage of the resources provided through the major research goals.

Because of their scope, the targeted research initiatives will require funding beyond that available through the Arthritis Foundation alone. The Foundation will invest some of its own funds and seek partnerships with others to meet the funding needs of the initiatives. Toward this end, the Arthritis Foundation will serve as an international convener of academics, industry, patients, clinicians, voluntary health associations and others to build alignment and support for the goals, gain input on blueprints for action, and examine key research questions. This will position the Arthritis Foundation as the international thought leader and leading advocate in efforts to improve the lives of people with osteoarthritis, rheumatoid arthritis and juvenile arthritis.

The goal-oriented research initiatives will serve a central role in fundraising. On the one hand they will appeal to major donors who want to invest in transformative projects. On the other they will serve to demonstrate the overall impact of the Arthritis Foundation and strengthen unrestricted fundraising among donors who simply want to improve the lives of people with arthritis.

In addition to targeted research, the Arthritis Foundation will continue to invest in training arthritis investigators in order to bring more talent into the field and develop future capacity for clinical and scientific leadership. Investigators developed through the Arthritis Foundation's programs provide the pipeline that produces clinicians who care for patients and researchers who translate basic science discoveries into new interventions.

Two specific approaches to training and career development grants are:

1. Continue to sponsor the traditional Postdoctoral Fellowship program, modified as appropriate to meet emerging needs of trainees and scientific opportunities.

2. Implement a new early career development award to fund arthritis researchers at the beginning of their career. Applications for these grants will be peer reviewed nationally with specific numbers of grants allocated per region.

IMPACT OBJECTIVE 4: Influence policies and strategies to produce better outcomes for people with arthritis.

This is an era of major change in our country's approach to maintaining health and well-being. At the federal, state and local levels, concerted efforts are now underway to determine how to improve health outcomes while reducing health costs. Chronic diseases such as arthritis have been targeted for attention, providing significant opportunities for the Arthritis Foundation to advocate for change. In addition, a national movement is gaining momentum to produce community conditions that encourage and assist people in adopting healthy behaviors, such as regular physical activity. Leaders within this movement have indicated that the Arthritis Foundation's expertise and large supporting constituency will be welcome and influential. Volunteer mobilization including the recruitment, retention and development of advocates and Arthritis Ambassadors will be critical to success.

Deliverable

Provide national leadership in achieving federal, state and local policies that strengthen arthritis prevention, promote greater innovation and investment, and improve access to quality care.

Tactical Approach

The Arthritis Foundation will focus its advocacy on three areas:

1. Prevention

The Arthritis Foundation will assist in developing and implementing federal and state public health policies and practices through approaches, such as:

- utilizing arthritis disease burden, surveillance and economic data to focus national prevention efforts and attention on arthritis;
- leading a coalition to deliver on the recommendations of the National Public Health Agenda for Osteoarthritis focused on self-management, physical activity, injury prevention and weight reduction; and
- partnering with the CDC and state public health departments to ensure that every state has a funded program dedicated to alleviating the burden of arthritis.

2. Innovation and Investment

The Arthritis Foundation will perform a leading role in advocating for significant increases in federally funded arthritis research. This will include:

- collaborating with the NIH to increase arthritis funding and to focus on the osteoarthritis, rheumatoid arthritis and juvenile arthritis research agendas;
- partnering with Congress and the Department of Defense to increase osteoarthritis research; and
- advocating for comparative effectiveness research focused on arthritis.

3. Access

The Arthritis Foundation will advocate for policies that improve access to quality care for people with arthritis. This will include:

- working with entities involved in health reform to recommend expansion of models proven effective at improving quality of care for people with arthritis;
- influencing policies regarding insurance reform to ensure that people with arthritis have access to affordable health care without restricting access to needed therapies and providers;
- partnering with others to ensure the approval of safe and effective therapies, including "biosimilars"; and
- contributing to the national dialogue on how to expand the workforce of health care professionals trained to provide care for people with arthritis and advocating for appropriate workforce policies. For example, the Arthritis Foundation will continue and expand its efforts to enlarge the pipeline of pediatric rheumatologists through federal funding of the HRSA loan repayment program for pediatric specialists.

This component of the agenda for change will provide specific opportunities for volunteers to achieve major impact through targeted advocacy. That impact will include attracting substantial funding to the cause, making policy work a critically important area of resource development.

IMPACT OBJECTIVE 5: Reduce arthritis-related disparities in health and health care.

Within our society there are numerous populations that experience disparities in their health and access to health care due to race, culture, economic status, geographic location and other factors. Reducing these disparities in people with arthritis will be critical to achieving the Arthritis Foundation's 2030 high-level goal.

Deliverable

Catalyze a national disparity reduction effort focused on arthritis.

Tactical Approach

Developing a strong disparities reduction effort will involve:

1. identifying and focusing Arthritis Foundation resources on those disparate populations that have highest need and largest populations nationally and locally.

2. utilizing proven methods to partner with disparate populations to:
   - learn what their community of people with arthritis need and want to improve their quality of life; and
   - offer effective approaches that can be sustained to improve the populations' health. For example, a demonstrated effective approach is to offer small community transformation grants from the national partnerships to local Arthritis Foundation offices and a community partner to improve the function of those disparate populations with arthritis. An example could be partnering with local patient navigators such as *promotores* in the Hispanic community, patient navigators in the Indian Health Service, and church health navigators for the African-American community that could let the population know what to do and what the Arthritis Foundation offers to improve their arthritis.

3. collaborating with local entities and national partners to decrease health disparities.
   - In order to achieve reach that is both broad and deep, the Arthritis Foundation will focus particular attention on developing partnerships with national organizations that have local affiliates. These may include, among others: the National Alliance for Hispanic Health, African-American churches, the Office of Minority Health within the Department of Health and Human Services, the Office of Women's Health, and the Disparities Initiative of the National Institute of Arthritis and Musculoskeletal and Skin Diseases.

4. raising awareness about arthritis in disparate populations among federal and state entities. Examples include:
   - legislative vehicles
   - executive recognition
   - congressional briefing
   - town hall meetings between Arthritis Foundation regions and legislators from disparate congressional districts
   - regional offices of minority and women's health

As with the other impact objectives, this component of the plan will bring significant benefits to the Arthritis Foundation, as it will broaden its relationships with people and organizations that are critically important to achieving the high-level goal and can make significant contributions to advocacy and fundraising.

Partnership and Resource Mobilization

The Arthritis Foundation will play a leading role in mobilizing the involvement and funding necessary to achieve its goal.

- E-advocates, ambassadors and volunteer leaders will be powerful advocates for policy change and conveying the message that the status quo for arthritis is unacceptable.
- Volunteers will have critically important roles in fundraising, advocacy and implementing the system of patient guidance.

- Institutional partners will provide enhanced capacity and reach.
- Individual and institutional donors will provide the financial capacity to launch and sustain key strategies and maintain leadership in advancing a nationwide movement on behalf of people with arthritis.

Deliverable

The Arthritis Foundation will dramatically increase its financial support.

Tactical Approach

The agenda for change will provide the case for support and opportunities for investment. Giving opportunities will align with impact strategies, so that donors can know that their investments will have specific impact and be leveraged by the investments of others. Achieving significantly increased funding will involve a focus on the following:

1. "Strategic Grant Partnerships"

The Arthritis Foundation's regional and local operations will continue to seek annual support via sponsorships at the local and regional levels. But with the leadership of the national and regional offices, the Arthritis Foundation will strengthen its efforts to seek strategic grant partnerships – partnerships in which institutions provide substantial, sustained support for Arthritis Foundation strategies because they can gain significant benefit from the success of those strategies:

- **Health Systems and Insurers** can gain financial and market-building benefits from improved patient guidance in an era focused on improving outcomes. They can contribute dollars to enhance the Arthritis Foundation's capacity to manage the guidance function and can also become key sources of patient referrals to the Foundation.
- **Foundations** can gain mission-achievement benefits. For example, foundations focused on health system change, serving people with chronic conditions, or the healthy communities movement may view the Arthritis Foundation as a vehicle to demonstrate a more holistic health system aimed at preventing serious illness.
- **Corporations such as pharmacy chains, pharmaceuticals and orthopedic device manufacturers** can gain market-building benefits via greater patient information (creating capacity for more people to act on arthritis) and product development benefits via a strategic research agenda. They may also work with the Arthritis Foundation to provide employee benefits via wellness support.
- **Government agencies:** The Arthritis Foundation may encounter a host of new funding opportunities that emerge from the federal health legislation. That legislation is creating new sources of funds for efforts to study, develop or demonstrate approaches to improve patient outcomes while controlling costs.

2. A robust individual major gift program (including planned gifts)

Individual major giving typically results from a process as follows:

- Developing relationships of personal value to potential donors
- Through these relationships, identifying individuals with significant giving potential
- Encouraging deeper involvement and a focus on the organization's mission and plans
- Determining, through discussion, donor motivations and giving objectives
- Soliciting giving commitments
- Providing donor recognition and stewardship

Making this process work on a large scale will require creating new management and volunteer capacities and building a major gift culture at all levels of the Arthritis Foundation. This will involve the following:

- **Talent development and collaboration**
  Building on its successful planned giving model, the Arthritis Foundation will develop a unified team of experienced professionals dedicated to major gift fundraising, and engage passionate volunteers in leadership and supporting roles. Leaders at the national and regional offices will work with this team to foster collaborative relationships and use of best practices at all levels of the Foundation.
- **A focus on relationship building and major donor identification**

In the context of the strategic plan, the Arthritis Foundation will be providing personal guidance at the local level to many people affected by arthritis. This will provide opportunities to build strong relationships, identify grateful individuals who may have significant giving capacity, and initiate giving-related conversations. The direct mail program and other broad-based appeals will also continue to be an important source of major prospect identification by providing a focus on standout annual donors.

- **Donor recognition and stewardship**
  This will include Foundation-wide recognition programs and gift clubs, strategic cultivation and stewardship events, and reports to donors on Arthritis Foundation impact related to their giving.

- **Supporting policies**
  Revenue and solicitation policies will seek to maximize unrestricted revenue, ensure that the Foundation honors donor intent, limit solicitation to key areas of need and strategic focus, and prevent conflicts of interest.

3. Increased urgency within events and broad-based appeals by including a strong focus on the Arthritis Foundation's agenda for change

The Arthritis Foundation will incorporate a demand for change and messages associated with "making arthritis unacceptable" into its special events program and seek opportunities to incorporate calls to action – such as involvement in advocacy for specific policy objectives and encouragement to utilize the Foundation's guidance capacity – into certain events. In so doing, the Foundation will seek to generate energy, media coverage, awareness among policymakers and others of the Foundation's large supporting constituency, and recognition among participants that their involvement in a special event should be the beginning of a broader relationship with the Arthritis Foundation.

This will call for disciplined execution of special event fundraising best practices to deliver significantly greater numbers of participants and contributions through events that deliver compelling and consistent messages aligned with the Arthritis Foundation's strategic purpose.

Broad-based appeals such as direct mail will also incorporate the "making arthritis unacceptable" message platform, consistently conveying the Foundation's goal, role and strategies.

Next Steps

With approval of the strategic plan, the Arthritis Foundation will turn immediately to implementation planning, driven by teams of national and regional staff to: determine actions and timetables to execute the plan; determine human resource and budget requirements; and establish structures to ensure that all components of the plan are well integrated.

Summary

This is a time of enormous opportunity to achieve large-scale impact and transform the way our society responds to the growing challenge of arthritis. By taking the lead in realizing this opportunity, the Arthritis Foundation will provide a service of historic importance and develop new strengths: a results orientation, strategic focus, broader and deeper support, and recognition as the indispensible leader of a nationwide movement to improve the lives of millions of people with arthritis.