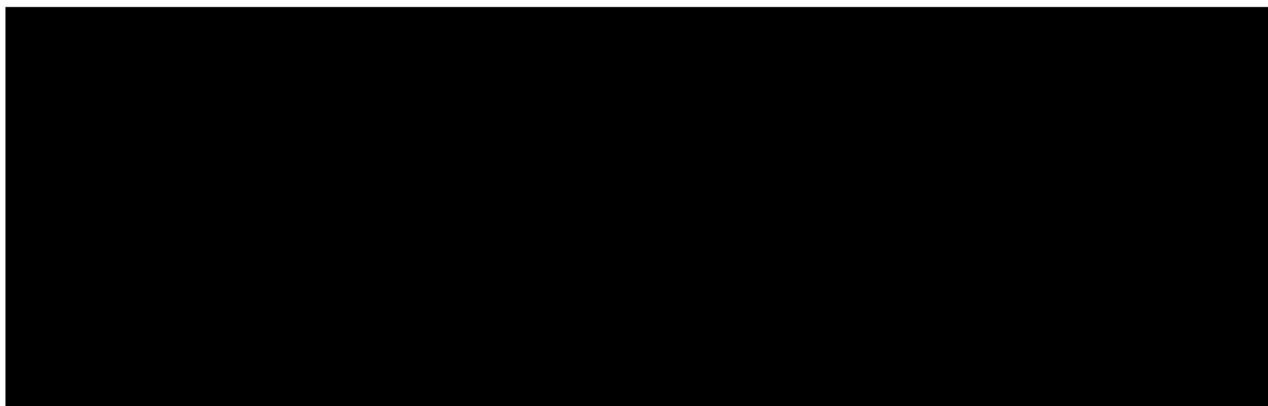


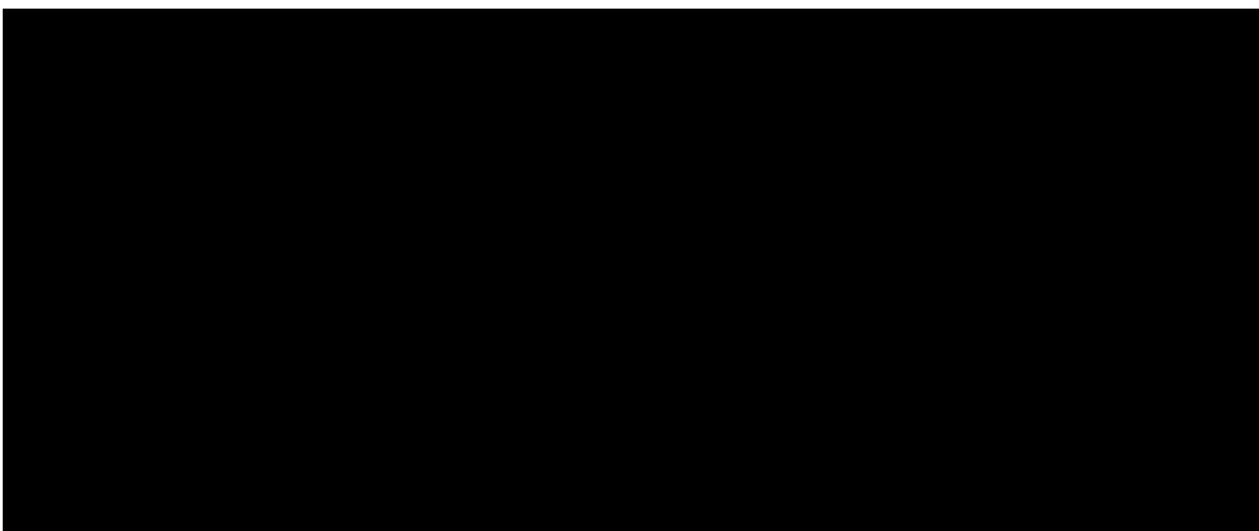
Feb. 21, 2017

The Honourable Jim Reiter  
Minister of Health  
Legislative Building  
Regina SK S4S 0B3

Dear Minister Reiter:



In the meantime, you requested further information on the impact of Canadian Plasma Resources on Canadian Blood Services' operations in Saskatoon. In addition to the overview provided on pages 32 to 34 in the business plan, attached please find a document describing the Saskatoon environment to date. This document includes a chart demonstrating Saskatchewan's collections results versus national results. Also attached is a report from a 2016 Ipsos survey on the subject of paid versus unpaid donations. This information highlights the many factors to be considered, and speaks to the need for ongoing coordination of how we, corporate members and Canadian Blood Services, work together in the best interests of the national blood system and the patients we serve.





Sincerely,



Leah Hollins  
Chair, Board of Directors

Enclosures

c.c.: Max Hendricks, Deputy Minister of Health  
Kimberly Kratzig, Assistant Deputy Minister  
Patrick O'Byrne, Executive Director, Saskatchewan Disease Control Laboratory  
Judy Hoff, Director, Transfusion Services  
Dr. Graham D. Sher, Chief Executive Officer  
Watson Gale, General Counsel and Corporate Secretary  
Jean-Paul Bédard, Vice-President, Public Affairs  
Lindy McIntyre, Director, Government Relations  
Pierre Cyr, Director, Board and Stakeholder Relations

# Saskatoon Performance and CPR Impacts

## 1. Purpose

This document provides a year end assessment of key performance metrics for the permanent clinic site in Saskatoon to determine whether Canadian Plasma Resources (CPR) is impacting the performance of the clinic and the associated donor base supporting this site.

## 2. Summary

- Donation frequency has leveled off and remained fairly consistent year over year.
- The donor base has increased at this site in the past few months bringing it above the March 2016 donor base numbers. This is due to increased new donor acquisition year over year.
- The lapsing results are only visible after 12 months, since March is the first month we are able to compare lapsed donor information it is still too early to form any definitive conclusions. We will need to continue to monitor.
- The 17-to 24-year-old segment is experiencing a double-digit decline at the Saskatoon site. This could be attributed to CPR and the demographic they are targeting for recruitment. This trend is not reflective of national and regional trends for this age cohort.

## 3. Analysis

### Donor acquisition

Since the last report generated with results from April –December we have seen an increase in new donors in Saskatoon. Despite a 35.8 per cent increase in new donors for the Saskatoon site, the numbers are still below the new donor target for the area, and the clinic continues to under-collect against target. This suggests that new donor acquisition appears insufficient to meet target, or that individuals in the donor base are not booking appointments.

Average	April – March 2016	April – March 2017	
	# New Donors	# New Donors	Increase in New Donors
Saskatoon (S0002)	1,184	1,608	35.8%
Rest of Saskatchewan	1,797	2,079	15.7%

April 20, 2017

**Previous report data**

Average	April–December 2015	April–December 2016	
	# New donors	# New donors	Increase in # new donors
Saskatoon (S0002)	1,005	1,262	25.6%
Rest of Saskatchewan	1,182	1,457	23.3%

**Donor segmentation**

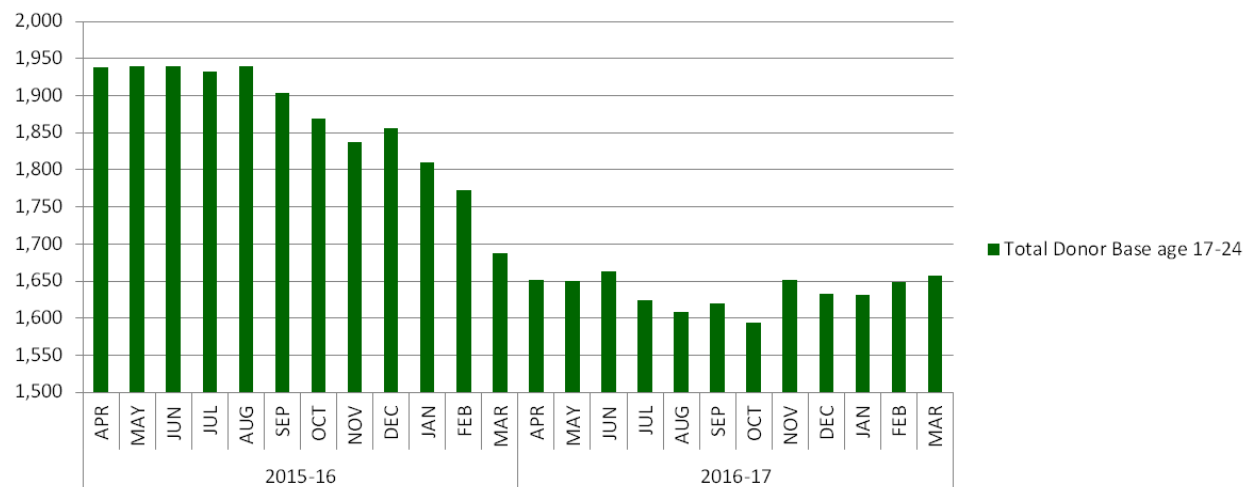
Examining the 17- to 24-year-old segment of the active donor base for Saskatoon, there has been a notable downward shift in both the percentage of active donors and percentage of collections they represent. Assuming this cohort is one of the main targets for CPR (considering the placement of their site); this group is highly susceptible to be drawn away from a non-remunerated model.

**Saskatoon (S0002) Active Donors (aged 17-24)**

	2015-16	2016-17	% change
% of active donors	23.2%	20.1%	-13.4%
% of whole blood collections	18.0%	16.5%	-8.3%

April 20, 2017

### S0002 - Saskatoon Whole Blood Donor Base (age 17-24)

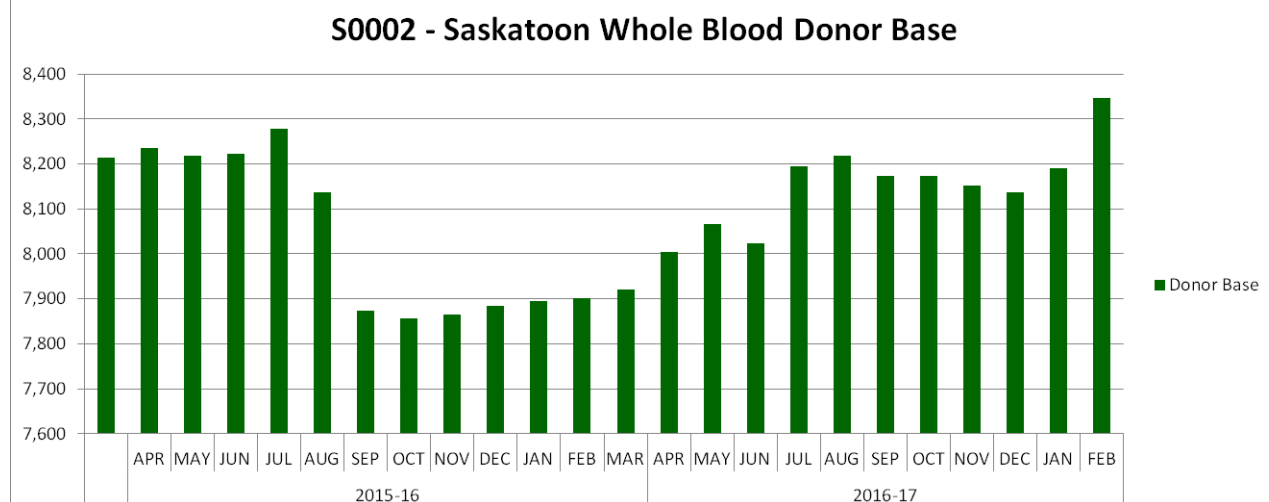


#### Donor frequency

The active donor base (an active donor has made at least one donation in the last 12 months) and donation frequency does not show evidence of an impact of CPR's operations on Canadian Blood Services. The chart below tracks the monthly active donor base and donation frequency for the permanent site in Saskatoon.

The Saskatoon donor base has increased by +445. This increase year over year can be attributed to increase in new donors. However, the combination of donor frequency and the size of the donor base should lead to targets being achieved.

#### Donor Base & Donor Frequency

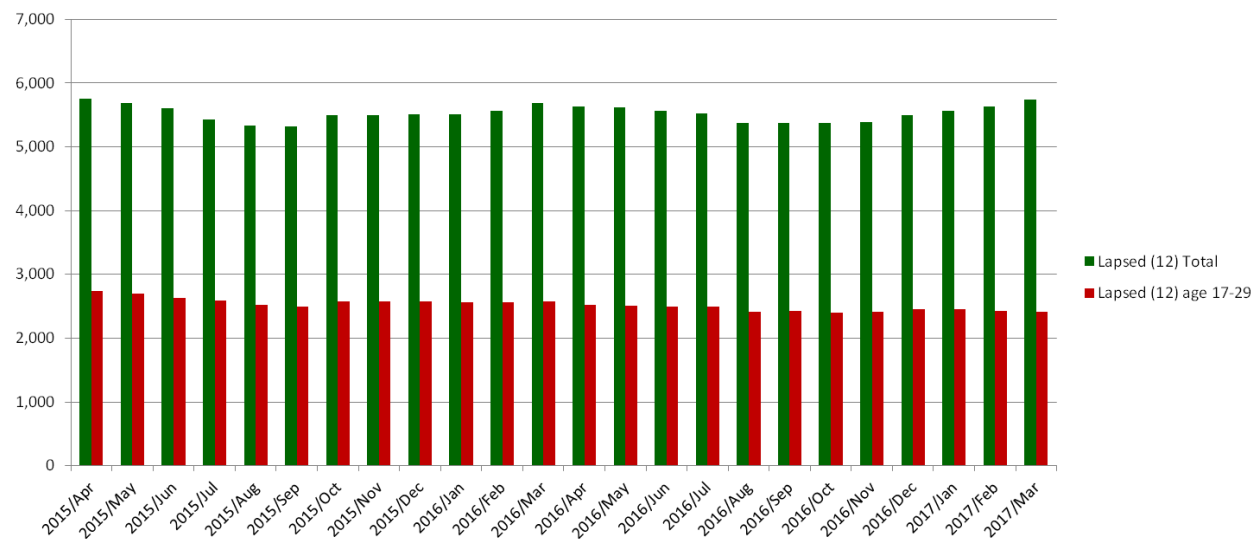


April 20, 2017

Average	As of March 2016		As of March 2017		Change	
	#Donors	Don. freq.	#Donors	Don. freq.	#Donors	Don. freq.
Saskatoon	7,902	2.28	8,347	2.27	0.5%	-0.4%

#### Lapsed donor April 2015- March 2017

The number of lapsed donors continues to remain even month over month even within the 17-29 age bracket. There are seasonal dips and peaks through the year. While we do see a slight increase month over month for February and March 2017 this is mirrored in previous years as well.



#### 4. Conclusion

Further analysis on the first full year of CPR operations does not seem to show any clear indicators of CPR impacting Saskatoon collections performance. New donor numbers continue to increase month over month and collections are remaining steady with a slight increase year over year. Evidence does point to a drop in involvement of the critical 17- to 24-year-old donor segment.

Taken together, the brand confusion between Canadian Blood Services and Canadian Plasma Resources, and the early indicators of performance degradation within the 17-24 age bracket, suggests the need for heightened vigilance on this matter. Further analysis will continue to be conducted on a quarterly basis.

# Impact to Paid Plasma on Perm Sites

## 1. PURPOSE

This document provides a quarterly assessment of the key collection and donor base performance metrics for permanent sites that have a paid plasma operation in close proximity, as these paid sites move through various stages of maturity.

Community	Paid Plasma Operation	Stage	Date Opened	Distance from Perm
Saskatoon	CPR (Canadian Plasma Resources)	Open - Stable	2016-02-01	6.6 km

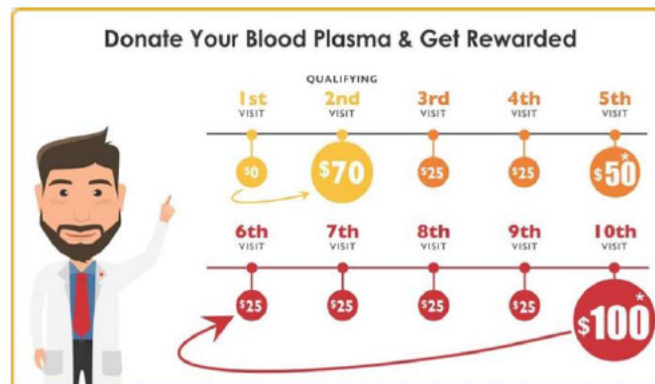
Four stages of maturity have been identified:

- 1) **Planning** - no active site or recruitment however, awareness of potential opening of paid plasma site in the community
- 2) **Pre-Open** - site selected and open, with active recruitment of donors for initial inspection period of collections
- 3) **Open – Growth** - site is open and passed its inspection period; actively recruiting donors in regular operation as part of growth phase (first 1 year of opening)
- 4) **Open – Stable** - site is open and actively recruiting donors in regular operation (has been opened for >1 year)

## 2. EXECUTIVE SUMMARY

## Saskatoon

- In Saskatoon, Canadian Plasma Resources (CPR) has been operational since February 2016 and has approx. 60 appointments per day, 5 days a week. They are located near a post-secondary campus
- Environment in Saskatoon is very competitive with CPR. Most recently CPR once again increased their rewards program. It is now a tiered program with the 10<sup>th</sup> visit paying the donor \$100. They also run a quarterly \$2K trip giveaway with Air Canada.

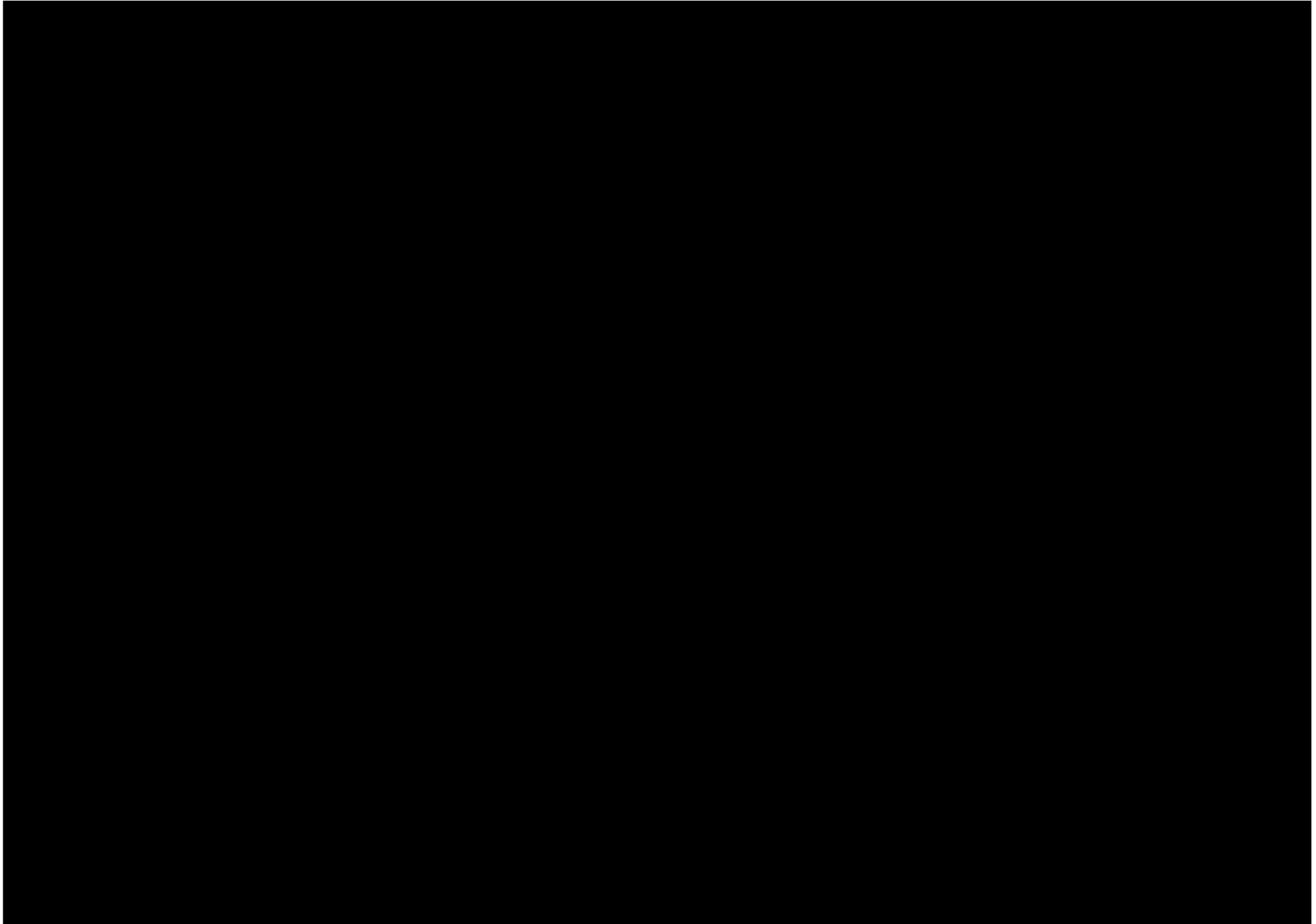


- The CBS Saskatoon Permanent clinic relocated in July 2016
- In previous quarterly reports, Saskatoon had seen a notable downward shift in the % of active donors in the 17-25 age bracket however, as of 2017-18 Q1 this is beginning to level off (remained flat from the start of 2016-17 FY to the start of 2017-18 FY)
- The donor base continues to increase in Saskatoon, and we continue to see an increase in new donor acquisition year over year
- Lapsed donors remain flat for Saskatoon, with a slight downward trend in the 17-25 age bracket, indicating that there is little impact of CPR to the donor base.
- Further analysis on the first full year of CPR operations, plus the ongoing quarterly reporting, does not seem to show any clear indicators of CPR impacting Saskatoon collections performance. New donor numbers continue to increase month over month and collections are remaining steady with a slight increase year over year.

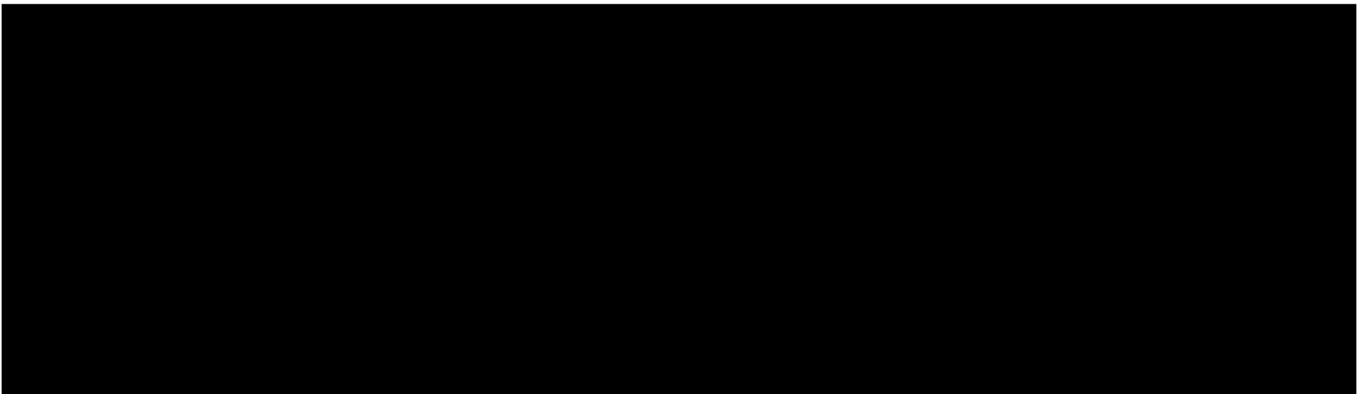


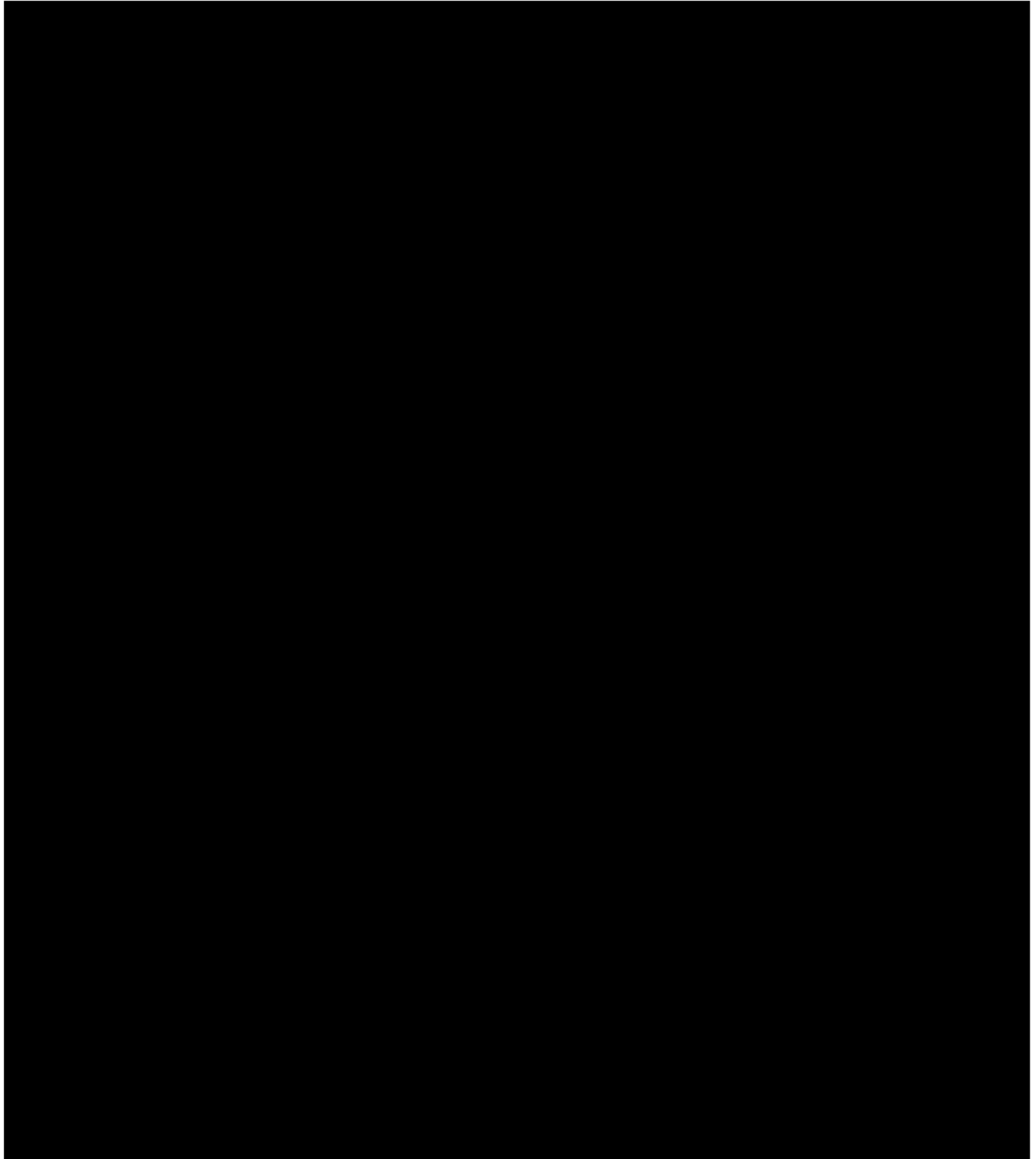
2017-18 Q1 Review

2017-07-18



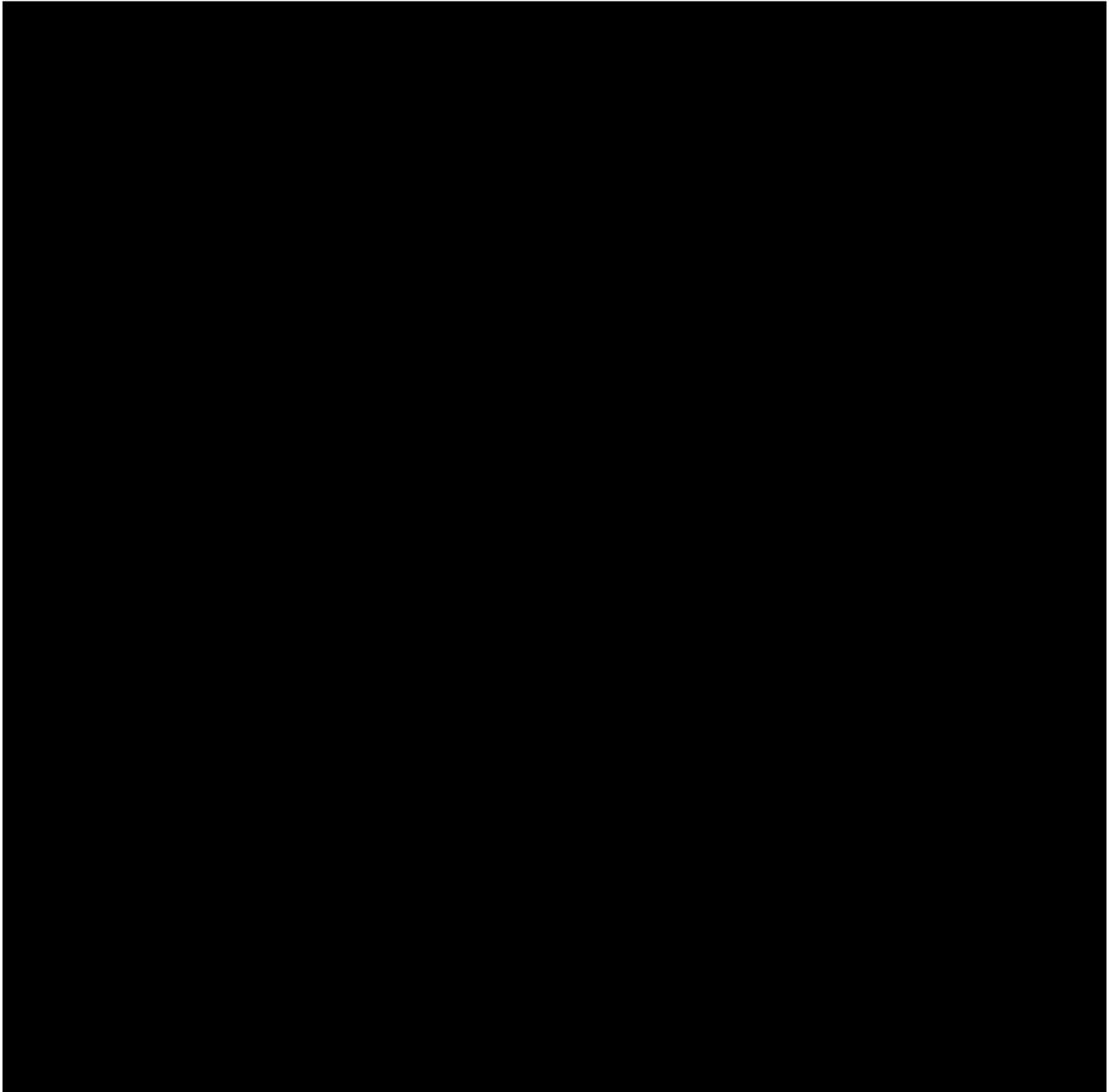
### **3. ANALYSIS**





2017-18 Q1 Review

2017-07-18



## Saskatoon

### Donor Acquisition

For Q1 of 2017-18, Saskatoon saw an increase in the number of new donors since the last quarter of 2016-17. Despite a 27.6% increase in the number of new donors since last quarter, the numbers are still below the new donor target for that territory.

	2016-17 Q1	2016-17 Q2	2016-17 Q3	2016-17 Q4	2017-18 Q1	
	# New Donors	# New Donors	# New Donors	# New Donors	# New Donors	Increase in New Donors (since last Quarter)
Saskatoon (S0002)	441	395	389	383	490	27.9%

### Donor Segmentation

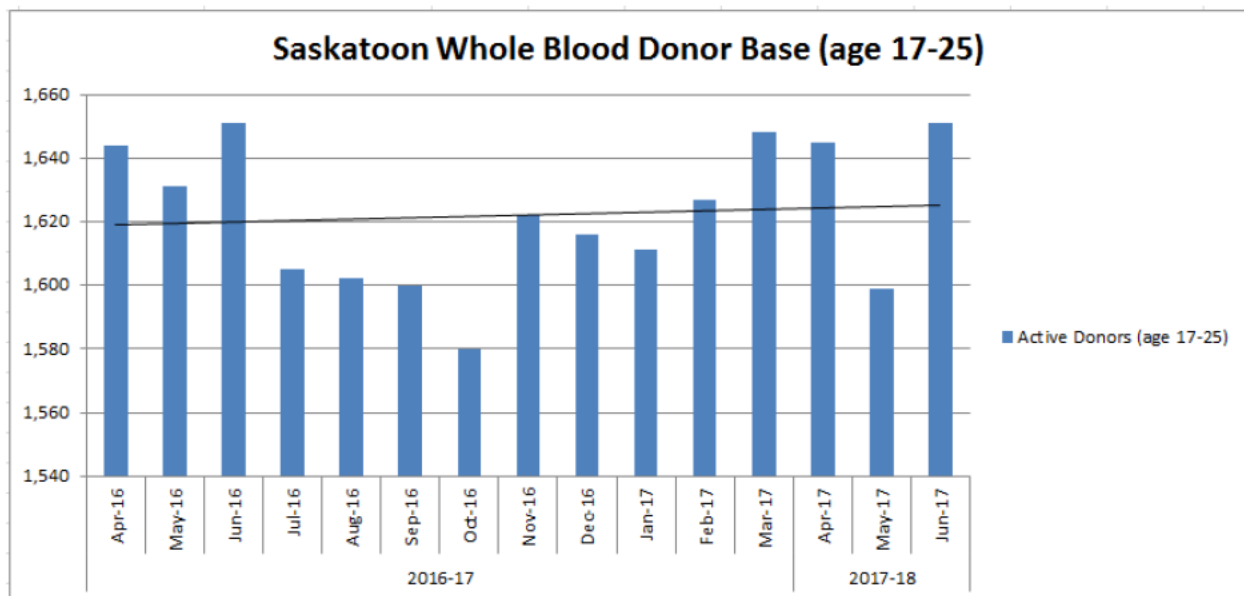
Examining the 17 to 25 year-old segment of the active donor base for Saskatoon, in previous reports, there has been a notable downward shift in the percentage of active donors. In Q1 of 2017-18, the % of active donors of in this age bracket still reduced, however the downward trend is starting to level off. Also, Saskatoon's % of active donors in this age bracket remains higher than the provincial and national percentages.

2017-18 Q1 Review

2017-07-18

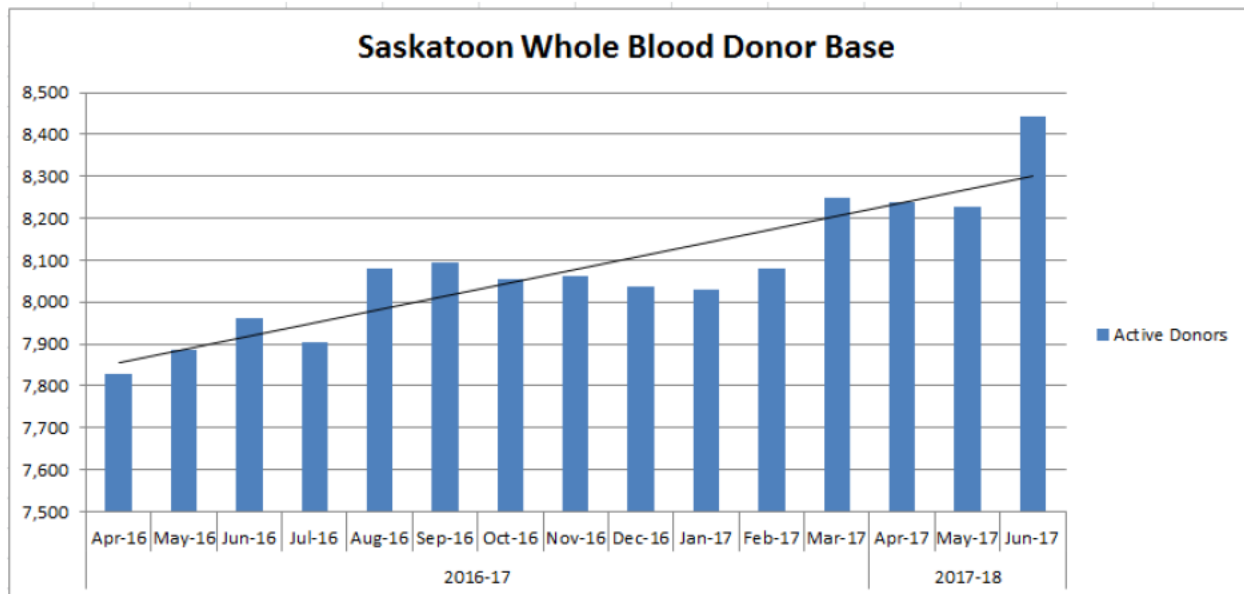
Considering the placement of CPR's site in Saskatoon (near a post-secondary campus), we have to assume this cohort is one of the main target audiences for CPR, and this group is highly susceptible to be drawn away from a non-remunerated model.

Active Donors (aged 17-25)				
	2015-16	2016-17	2017-18 Q1	% change from LFY
Saskatoon (S0002) % of active donors	23.2%	20.1%	19.6%	-2.5%
Saskatchewan % of active donors	17.5%	18.4%	18.0%	-2.2%
National % of active donors	17.5%	18.1%	17.3%	-4.4%



## Donor Base & Frequency

The active donor base and donation frequency for Saskatoon does not show evidence of an impact of CPR's operations on Canadian Blood Services. The active donor base for Saskatoon continues to increase, on an upward trend.



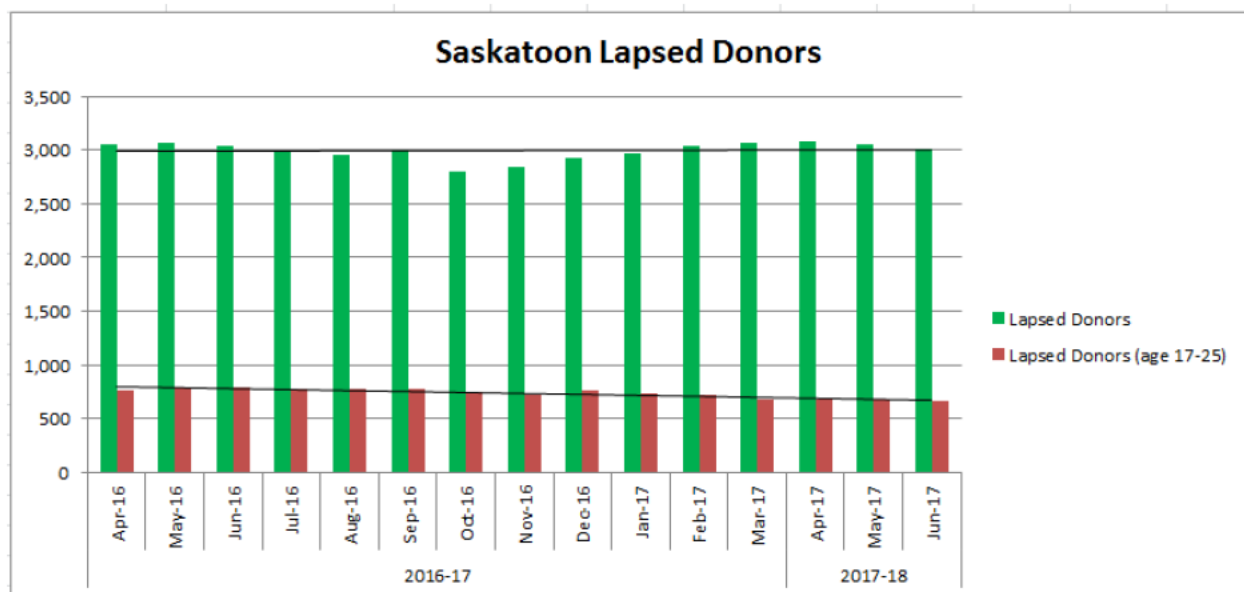
	2016-17		2017-18 Q1		Change from LFY	
	# Donors	Donor Frequency	# Donors	Donor Frequency	# Donors	Donor Frequency
Saskatoon (S0002)	8,249	2.20	8,444	2.16	2.4%	-1.8%

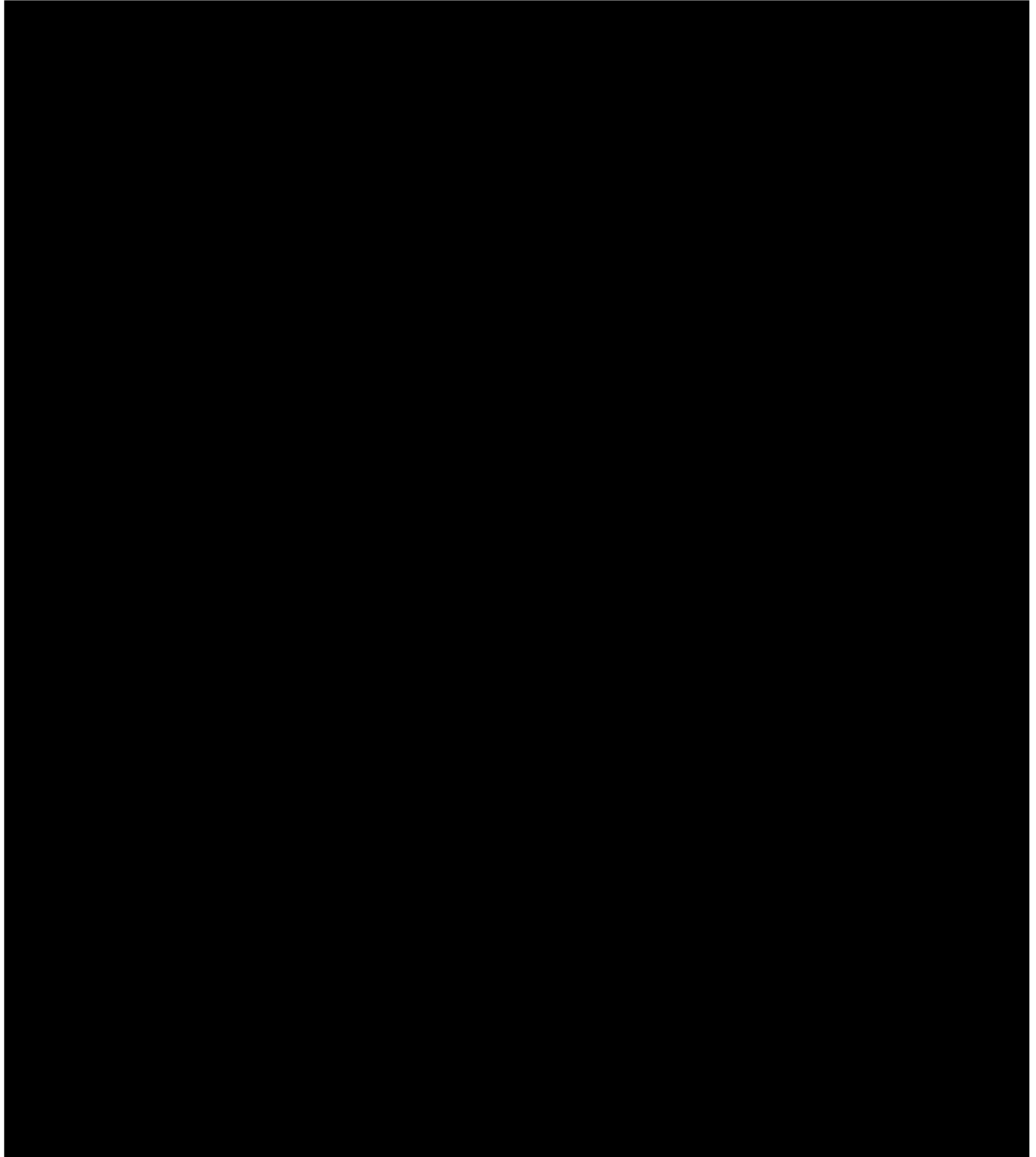
## Lapsed Donors

The number of lapsed donors continues to remain fairly flat for Saskatoon, with a slight downward trend in the 17-25 age segment.

2017-18 Q1 Review

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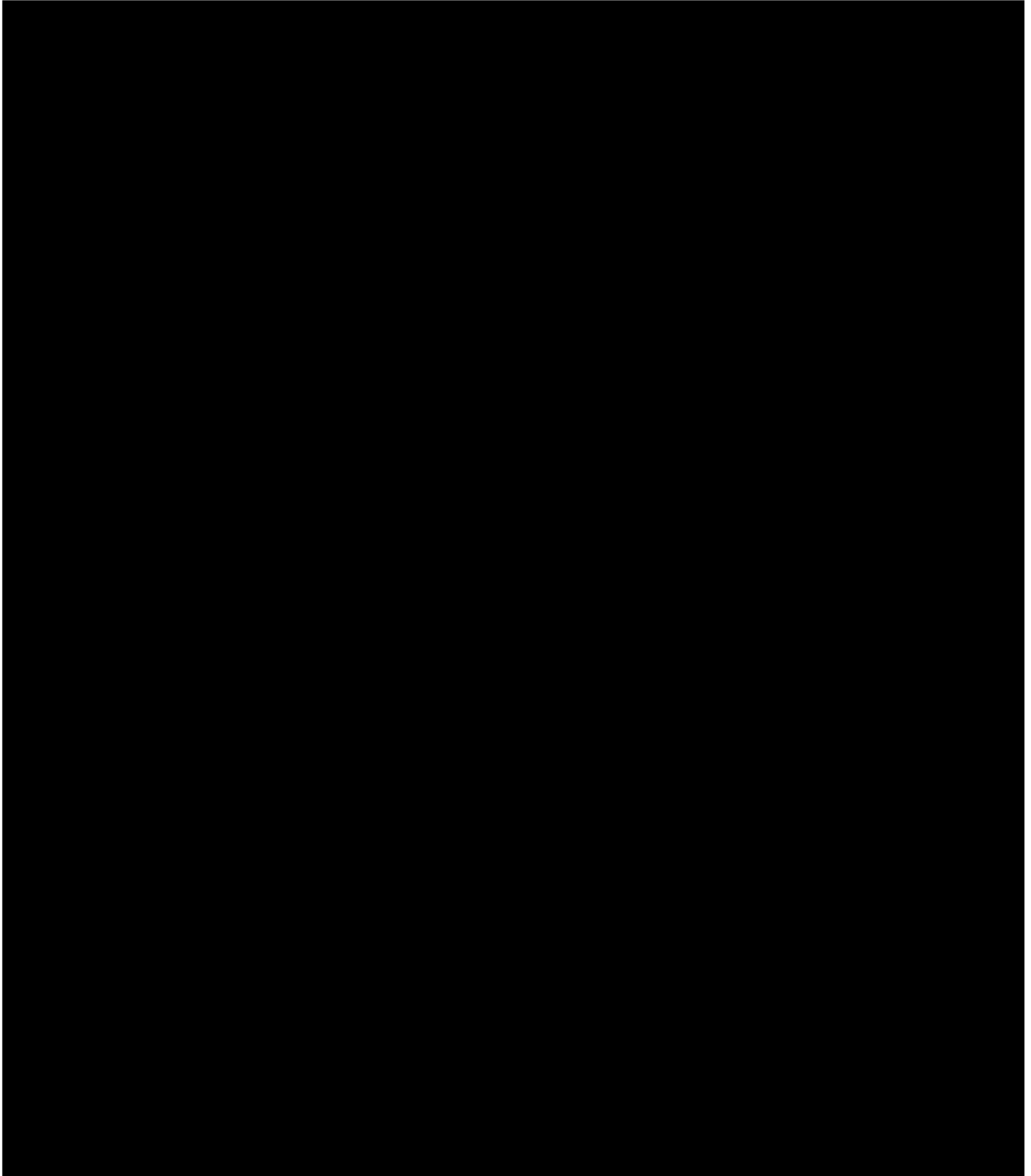


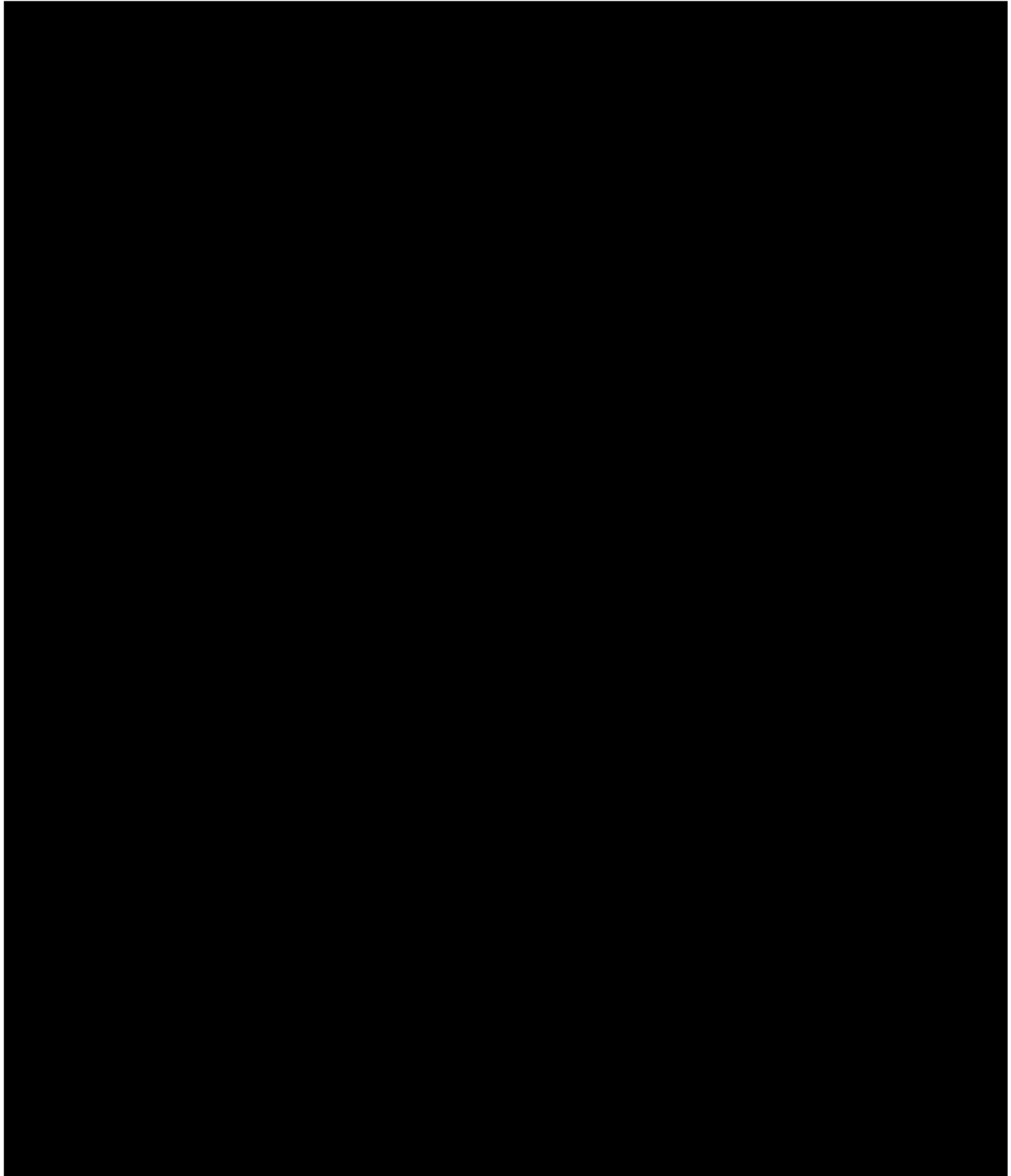




2017-18 Q1 Review

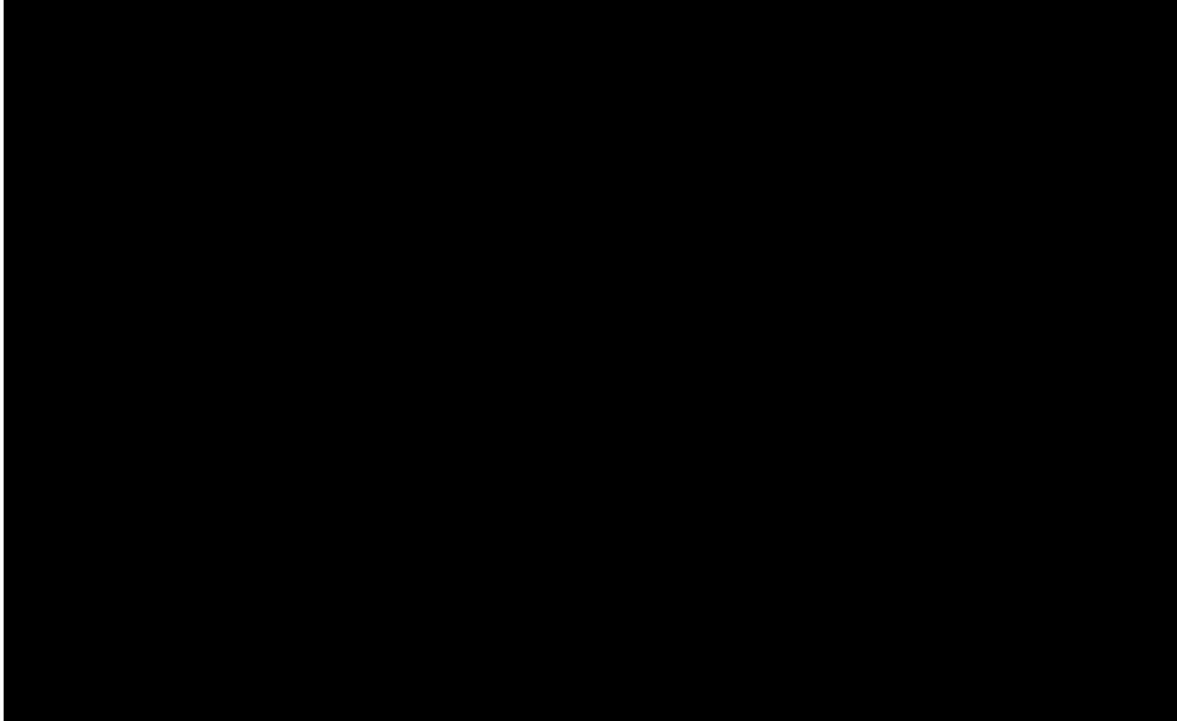
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2017-18 Q1 Review

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End of report.