

Five-Year Strategic Plan

Revised | August 2014



**Children's
Miracle Network
Hospitals**

Mission

We increase funds and awareness for local children's hospitals.

Vision

Together we save kids' lives.

Values

our
hearts
guide us

We believe in
our cause,
which motivates
us to do the
right things
for the right
reasons.

integrity

our
heads
unite us

We respect and
value each other,
which enhances
our ability to
collaborate
and innovate.

teamwork

our
hands
strengthen us

We lead by
learning from
the past,
planning for
the future and
dreaming big.

leadership

Executive Summary

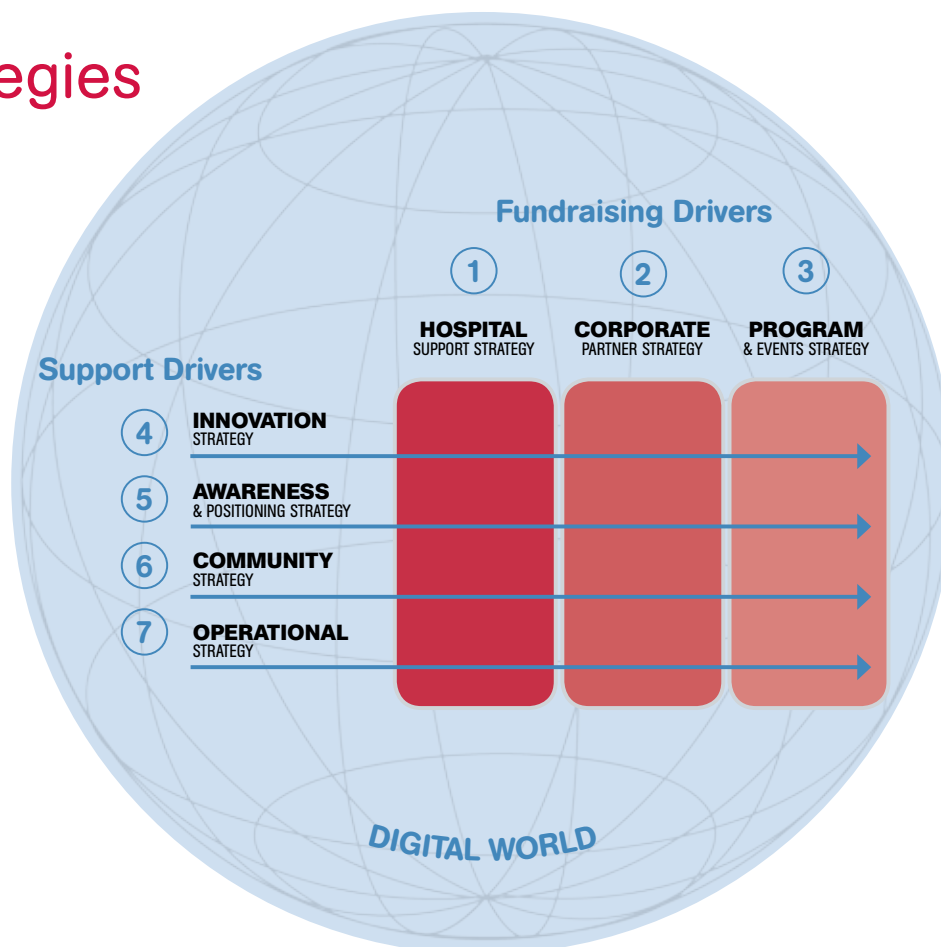
Children's Miracle Network Hospitals has reached an important stage in our life cycle—a stage in which we have the opportunity to embrace and execute a new bold strategy for children's hospitals/foundations or continue to stay the course. The need, and opportunity, for us to help our 170 member hospitals has never been greater. Our fundraising growth rates of 3-4% represent an opportunity to improve. Our five-year plan to raise \$372 million by 2016 is merely the first step towards our bold goal of quadrupling fundraising to \$1 billion annually to improve the health and wellness of children throughout North America. It will take time and the coordinated, passionate effort of all our stakeholders to reach these lofty goals. This plan represents our envisioned future.

We've built our strategies on CMN Hospitals' fundraising and support drivers which are illustrated in the diagram below. You'll notice our strategies all live within the digital world—a reality that is paramount to our fundraising success. While our foundation was built on relationships and will continue to rely on face-to-face interaction, we now communicate, network, play, socialize, shop, read and even work—all within the digital sphere. As individuals we are also willing to give and support charities digitally, but the ultimate code for digital fundraising and activation has yet to be cracked. Because of our Network we are uniquely positioned to crack that code. That's why the digital world is woven into every strategy in our plan: We believe we can be the leader in digital fundraising.

Understanding the world in which we live was essential to developing our long-term strategy. As part of the planning process, we examined trends among other reputable charities and in the general business world. A few important trends emerged:

- Charities are engaging donors throughout their lives, not just through one-time campaigns.
- Campaigns, events and acquisition efforts must be narrowly focused to an individual's interests and situation, not directed at a general audience. In the digital world, people expect to be engaged in ways that are relevant and applicable to their situation.
- The most reputable and recognized charities dedicate significant resources toward creating visibility and awareness through comprehensive media campaigns.
- Charities adopt national events to maximize fundraising potential and awareness for their cause.

Strategies



Executive Summary

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We've applied many of these trends to our strategies. We hope to set many of our own trends as we increase our focus on innovation.

1. HOSPITAL/FOUNDATION SUPPORT STRATEGY

Children's Miracle Network Hospitals exists to serve children's hospitals and foundations. To serve member hospitals/foundations more effectively, we will increase the fundraising value of hospital membership by providing a greater return on investment, strengthening regional support, improving communications and deepening relationships, resolving fundraising area alignment issues and establishing membership eligibility and participation standards.

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2. CORPORATE FUNDRAISING STRATEGY

National corporate partners are the lifeblood of CMN Hospitals. To raise more funds for member hospitals/foundations we will grow corporate fundraising through maximizing results with the 30 most promising corporate partners and by adding new partners of appropriate scale and effectiveness. This includes maximizing existing partnerships, seeking new corporate sponsors based on specific criteria, and accelerating fundraising success through regional support teams.

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3. PROGRAM & EVENT STRATEGY

Program fundraising represents 28% of our overall fundraising total. We will grow program and event fundraising opportunities for member hospitals by growing our Radiothon, Dance Marathon, and Extra Life programs through increased resources and focus. We will also explore new programs and events based on the learnings and strengths of current programs and market success.

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4. INNOVATION STRATEGY

Pioneering successful fundraising programs in the world today requires a culture that embraces the creation, development and improvement of cutting-edge concepts. To reach the level of growth needed to raise \$1 billion annually, we have to think differently about what we do and how we do it. We will innovate in order to increase our value to stakeholders by putting organizational practices in place to allocate budget, provide resources and develop a culture of innovation; creating a process for screening, incubation and testing new ideas; and applying innovative solutions to fundraising, product development and operational activities.

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5. AWARENESS STRATEGY

Many children's hospitals in the U.S. are not seen as charities. We will generate awareness to position local children's hospitals as critical charitable organizations in need of philanthropic support by leveraging our charitable brand, exploring a national media campaign, activating celebrity partners, and improving communications externally and internally.

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6. COMMUNITY STRATEGY

To maximize fundraising in the future, CMN Hospitals must acquire significant new donors and advocates on behalf of member hospitals. We will increase donor acquisition for member hospitals/foundations by identifying, building and activating a community of individuals with an affinity for children's hospitals. To do so we will become better at acquiring individual data and providing that information to hospitals. We will also build lifelong affinity for the cause by leveraging digital technology and increase fundraising to specific segments of the market.

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7. OPERATIONAL STRATEGIES

To increase opportunities to grow fundraising in the future, we will apply a new funding approach for new initiatives, evaluate and explore long-term solutions to funding growth, test and explore ways to create and fund a national media campaign, create a business model that demonstrates fundraising growth over the next five years and support the fundraising strategy with an appropriate human resources strategy.

Hospital/Foundation Support Strategy



**Children's
Miracle Network
Hospitals**

Hospital/Foundation Support Strategy

Current Situation

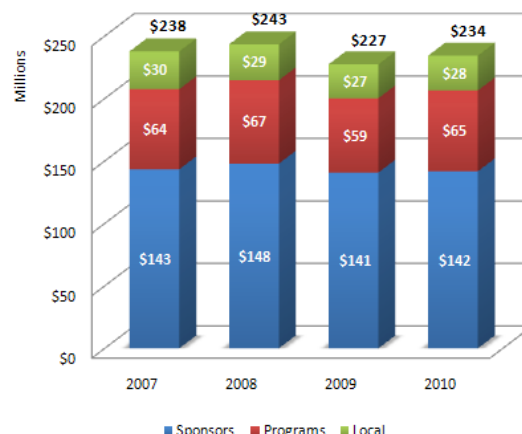
Children's Miracle Network Hospitals exists to serve and raise funds for children's hospitals and foundations. In order to gain a deeper understanding of how we are doing, we conducted a series of performance reviews, surveys and conversations with hospitals and foundation representatives.

PERFORMANCE INDICATORS

We conducted an analysis of our key performance indicators for the past four years. We parsed our fundraising results in a variety of ways from total fundraising year-over-year to results by corporate sponsor, program, region, market/hospital and against resource allocation. The exercise generated some important insights.

- Fundraising results on average have remained relatively flat over the past four years.
- Based on a weighted average of national and local hospital costs from 2010, we determined the following: 1) The estimated total cost to raise one dollar through CMN Hospitals programs is \$0.31. 2) For every dollar spent, an estimated \$3.28 is generated for local hospitals. 3) The return on investment was 228%.
- Significant opportunity exists to increase fundraising with our largest corporate partners in under-performing markets.
- Fundraising results have improved in markets where regional directors have provided additional support. In 2010, markets with region support increased sponsor-related results by 5.8% compared to 1.6% in all other markets.
- Hospitals are expected to implement a large number of national sponsorships and programs at the local level, often without the promise of significant fundraising value. We have 20 national sponsors generating more than \$1 million annually for member hospitals. More than 80 sponsors raise less than \$1 million annually.

TOTAL FUNDRAISING RESULTS (2007-2010)



COST TO RAISE \$1 (Quartile)

QUARTILE	COST TO RAISE \$1
1st	\$0.18
2nd	\$0.30
3rd	\$0.44
4th	\$0.66
Average	\$0.31

COST TO RAISE \$1 (Market size)

MARKET SIZE (POP)	COST TO RAISE \$1
> 3 Million	\$0.25
1 - 3 Million	\$0.32
< 1 Million	\$0.47

HOSPITAL/FOUNDATION SURVEY INSIGHTS (Number of Responses: 114 representatives)

Hospitals were invited to participate in a series of Town Hall-style discussions and an online survey to give feedback on key strategic questions. What did we learn?

- Unrestricted dollars, national partnerships and new donors are by far the most valuable things we can offer to member hospitals.
- Hospitals/foundations want stronger, more valuable corporate relationships.
- Sponsors should raise \$7,500 or more annually (per market) to be of value.
- Hospitals/foundations want better, more advanced fundraising.
- Hospitals/foundations want a greater return on investment for membership fees.
- Many hospitals struggle with their current fundraising boundaries.

CORPORATE SURVEY INSIGHTS (Number of Responses: 35 sponsor representatives)

CMN Hospitals and our member hospitals have traditionally covered costs of fundraising kits and campaigns. Most current corporate sponsors believe that CMN Hospitals national office or the local hospital should continue to pay for fundraising costs. However, at most other charities (i.e. St. Jude Research Hospital, American Red Cross, Feeding America, Habitat for Humanity and Make a Wish) the burden of expense is carried by the corporate partner.

The Current State Of Giving

"Over the past three years of the recession, foundations have experienced a falling return on investment. Likewise, costs to raise each dollar have climbed. At 33 cents in FY2010, the cost-to-raise-a-dollar through philanthropy remained stubbornly above 30 cents for the third year in a row, and return-on-investment declined, on average, more than four percent to just \$3.05 raised for every dollar spent on fundraising."

Kathy Renzetti

*Annual Report on Giving, Association Research Inc.
Association for Healthcare Philanthropy, 2010*

Hospital/Foundation Support Strategy

Overall Strategy: We will improve the fundraising value of hospital membership in the Network.

1. RETURN ON INVESTMENT

We will ensure membership fees represent a significant return on investment by:

- Quadrupling total dollars raised and overall value by both efficient and effective operations.
- Determining whether the current fee structure is appropriate and evaluating if a new model to reward individual hospital/foundation performance rather than aggregated network performance is needed.

2. REGIONAL SUPPORT

We will increase our ability to deliver maximum fundraising by providing regional support in the following ways:

- Equipping hospitals with knowledge and tools necessary to achieve return on investment.
- Strengthening our regional teams and their support of our top ten corporate opportunities within U.S. markets (top five in Canada).
- Providing regional support for centralized programs and events.
- Examining the possibility of a regional staffing model in Canada.

3. IMPROVE COMMUNICATIONS & DEEPEN RELATIONSHIPS

We will improve communication and deepen relationships with our member hospitals by:

- Understanding the needs of member hospitals and building collaborative relationships for action.
- Increasing contact from CMN Hospitals' national staff with executive, foundation, marketing, PR and other key hospital personnel.
- Providing an ongoing forum for program directors and hospital/foundation leadership - in particular chief development officers - to give us feedback.
- Make full use of digital technology to improve communications.

4. PROUD PARTNER INITIATIVE

We will establish, strengthen and enforce membership requirements that protect the value of the Network by:

- Defining hospitals' responsibilities as member of the Network.
- Defining CMN Hospitals' responsibilities to the members of the Network.
- Evaluating current eligibility and participation requirements in concert with member hospitals/foundations and updating, as appropriate.
- Enforcing agreed membership standards.
- Establishing a process for resolving fundraising area conflicts.

Corporate Fundraising Strategy



**Children's
Miracle Network
Hospitals**

Corporate Fundraising Strategy

Current Situation

National corporate sponsors are the lifeblood of Children's Miracle Network Hospitals. Sixty percent of total funds raised by CMN Hospitals for member hospitals and foundations comes from corporate partnerships. To strengthen our long-term corporate fundraising strategy, we've gathered information from both hospitals and our corporate partners through a variety of surveys, focus groups and one-on-ones. We also completed an internal analysis of our corporate fundraising partnerships and conducted a competitive analysis. As a result, we gathered the following insights.

HOSPITAL FEEDBACK

The most common request from hospitals is that CMN Hospitals should focus on fewer, more valuable corporate partners. New partners should raise an average of \$7,500 or more annually per market to be of value to the hospital. That means a U.S. national sponsor must raise a minimum of \$1 million per year to be of value to our hospitals. In Canada, a sponsor must raise a minimum of \$250,000 per year. The level of activation required by the hospital/foundation must match the return on investment.

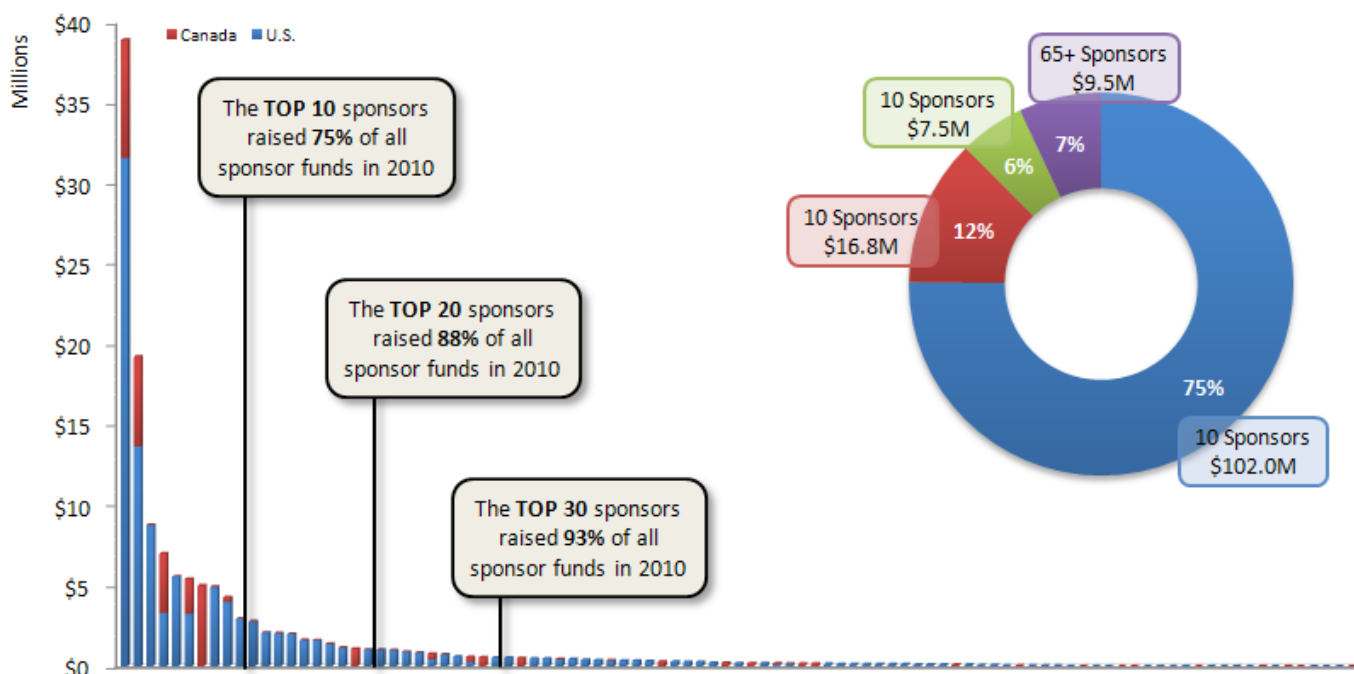
PERFORMANCE INDICATORS

Currently, there are more than 100 sponsors raising funds through employee, customer and vendor programs. Together, these partners represent more than 60,000 locations and 10 million employees. Campaigns and execution levels vary from partner to partner based on the specific needs of each organization.

Successful corporate campaigns require significant support at both the local and national levels to build relationships, to motivate and recognize employees and to identify and share best practices. In most markets, the success of our corporate campaigns is limited by the available resources at both the national and local level and the priority of fundraising potential. Recently, region support has enhanced our ability to focus on key accounts that bring the largest return on investment to member hospitals.

The charts below illustrate the concentration of funding from a few key sponsors. The top 30 sponsors raised 93% of all sponsor funds in 2010. The top 20 raise \$1 million or more each year while more than 80 sponsors raise less than \$1 million annually.

2010 SPONSOR FUNDRAISING



Current Situation (continued)

NEW SPONSOR ANALYSIS

From 2007-2010, we added 60 sponsors that have raised \$14.3 million. The vast majority of that growth has come from only five sponsors: Mike Weir Golf, IHOP, Miss America, Microsoft and Six Flags. These five sponsors account for \$10.6 million (74%) of the \$14.3 million raised by new partners.

We've recently had difficulty attracting and transitioning new sponsors into profitable, long-term corporate partners.

NEW SPONSOR FUNDRAISING RESULTS (2007-2010)

	COUNT	2007	2008	2009	2010	TOTAL	AVERAGE PER SPONSOR		
							YEAR 1	YEAR 2	YEAR 3
NEW IN 2007	9	1,755,489	2,595,894	1,750,214	2,536,035	8,637,632	195,000	283,000	194,000
NEW IN 2008	14	-	704,868	2,652,178	998,151	4,355,197	50,000	189,000	71,000
NEW IN 2009	17	-	-	462,197	687,153	1,149,350	27,000	40,000	-
NEW IN 2010	20	-	-	-	188,062	188,062	9,000	-	-
TOTAL	60	1,755,489	3,300,762	4,864,589	4,409,401	14,330,241	-	-	-

CORPORATE SPONSOR FEEDBACK (Number of Responses: 35 sponsor representatives)

A handful of corporate sponsor representatives told us that the priorities CMN Hospitals can help impact the most within their companies include:

- Attracting national media/PR attention
- Attracting local media/PR attention
- Demonstrating corporate social responsibility
- Supporting communities where they are doing business

The five things sponsors felt CMN Hospitals could have the least impact on include:

- Sales
- Driving Traffic
- Acquiring new customers
- Attracting national media/PR attention
- Increasing customer loyalty

Sponsors would like CMN Hospitals to:

- Increase focus on employee engagement.
- Increase awareness and provide more awareness tools (PSA's, graphics, ads, etc.).
- Provide celebrity endorsements.
- Help organize regional meetings and encourage collaboration among sponsors.
- Provide more recognition and assistance with local PR.
- Be better at planning, adhering to timelines and having a more responsive attitude.

The primary reason that corporations said they partner with CMN Hospitals is because it is a national cause with a local impact. Town Hall discussions revealed that corporate partners greatly value the individual connections that our campaigns create and the ability our campaigns have to create repeat customers.

The Current State Of Giving

More than 278 million people in the U.S. want to know what a company is doing to benefit a cause.

41% of Americans say they have bought a product because it was associated with a cause or issue in the last year.

Source: 2010 Cone Cause Evolution Study

63% of consumers would switch brands to help support a good cause.

Source: Edelman goodpurpose™ Study 2009

Employees who are very involved in their company's cause program are 28 percent more likely to be proud of their company's values and 36 percent more likely to feel a strong sense of loyalty than those who are not involved.

Source: 2010 Cone Cause Evolution Study

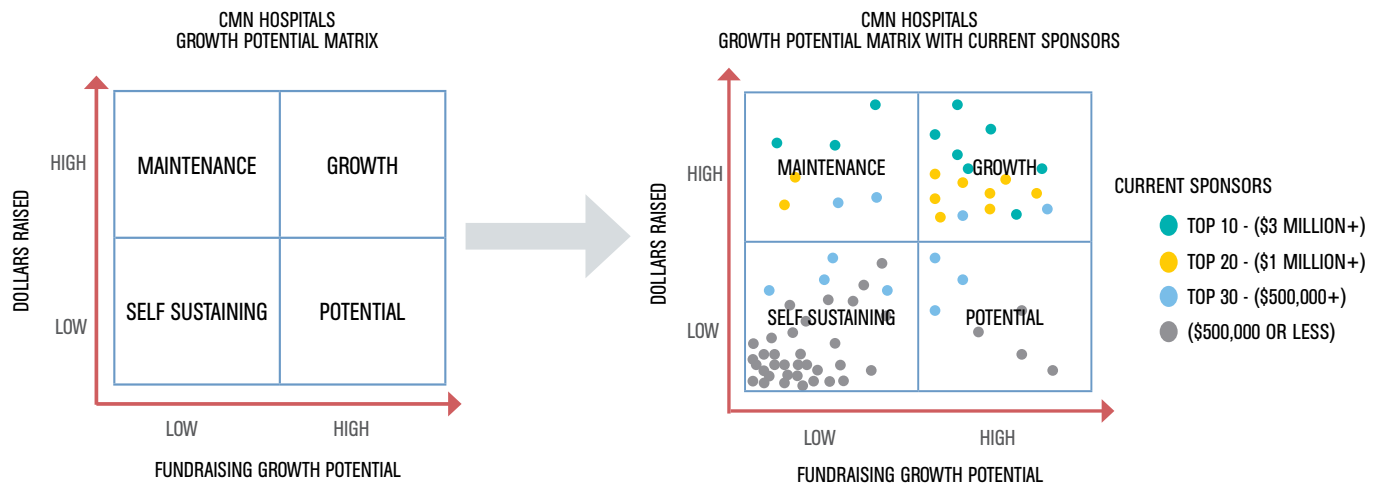
Corporate Fundraising Strategy

Overall Strategy: We will grow corporate fundraising through maximizing results with the 30 most promising corporate partners and by adding new partners of appropriate scale and effectiveness.

1. GROW EXISTING CORPORATE PARTNERSHIPS

We will maximize existing partnerships for the benefit of member hospitals by:

- Actively managing fewer, more valuable corporate partners. CMN Hospitals will create fundraising growth by focusing on the top 30 corporate partners with the most promise for fundraising results and scale by total dollars raised. Corporate partners must raise a minimum of \$1 million (\$250,000 in Canada) and have a significant business presence to warrant year-round active account management and resources.
- Creating a tiered-management system providing both staff and local hospitals/foundations with a powerful tool to allocate resources. Guidelines for staffing, communications support, recognition and other partnership resources will be established for each partnership tier.
- Focusing on the most promising corporate partners to enable CMN Hospitals international staff and our member hospitals/foundations to allocate resources for the greatest possible return.
- Evaluating corporate partnerships annually to ensure active engagement and growth potential.
- Utilizing a version of the Boston Consulting Group Growth Share Matrix to evaluate the ongoing growth potential of all corporate partnerships.



- Working with each of the managed corporate partners to develop three- to five-year plans with partnership, activation and fundraising milestones and goals. A transition plan will be developed for current corporate partners who do not qualify to be managed partnerships. Our smaller but committed partners will still participate in fundraising activities; however, we will provide access to resources and services in a primarily self-serve model. As smaller fundraising partnerships grow and develop, they will be elevated to the managed partnerships model.
- Developing a formula to create a fundraising equivalency for all underwriting contributions. The fundraising equivalency figure will be used to rank and place underwriting partners in the managed partners tiers.
- Accelerating fundraising success through regional support teams by developing growth plans for the top ten corporate opportunities in each U.S. market and top five in Canada.

Corporate Fundraising Strategy (continued)

2. NEW CORPORATE PARTNERS

We will acquire new corporate partners that provide the highest fundraising value to our member hospitals by:

A. Setting standards for new corporate partner acquisition.

- CMN Hospitals will adopt the partnership tiers and underwriting equivalency criteria for all new partnerships.
- New corporate partners must have the ability to raise at least \$1 million (or \$250,000 in Canada) in the first three years of partnership. These thresholds apply to fundraising dollars (1:1) or underwriting equivalency (10:1).
- We will provide creative approaches and innovative ideas for fundraising programs that fit the corporate culture of the sponsor and that CMN Hospitals is capable of supporting.
- We will create a dollar threshold to allocate internal resources and provide levels of sponsor benefits.

B. Establish the Board of Governors as our primary source of new prospect leads.

- Working with the Board of Governors, we will focus our efforts on the top tier new partner prospects with the greatest possible net worth to our Network. Prospects with a presence in both the U.S. and Canada will receive the highest priority.
- We will ensure appropriate advance communication, collaboration and transparency with senior leadership of our member hospitals when targeting any potential sponsor headquartered within a hospital market.

C. Establish relationships with select hospital chief development officers.

- We will create one-on-one relationships with chief development officers who are supportive of our business development efforts.

New Corporate Partner Criteria

- Raise \$1 million by 3rd year of partnership
- National/regional scope
- Credible brand/strategic fit
- Potential for growth
- Senior executive support and buy-in
- Realistic return on investment
- Dedicated resources to partnership
- Letter of Agreement/Contract

New Corporate Partner Categories for Growth

- Quick Serve/Casual Dining
- Specialty Retail
- Automotive
- Consumer Packaged Goods
- Mobile
- Entertainment
- Technology
- Transportation/Shipping

3. CORPORATE STRATEGY

We will control and manage CMN Hospitals' assets related to stewardship and the development of inventory and appropriate recognition throughout our system by:

A. Implementing targeted stewardship and recognition of our existing corporate partners.

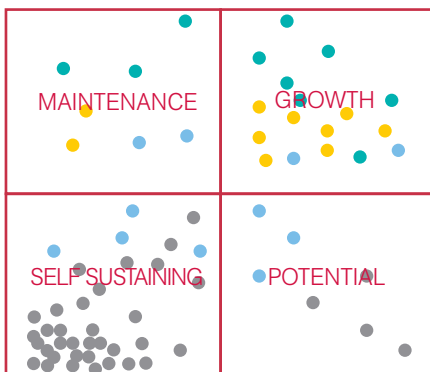
- Building and implementing a stewardship plan that touches the appropriate individuals throughout all levels of our corporate partners' organizations.
- Building and implementing a local hospital corporate stewardship and recognition strategy that can be implemented by the regional team.
- Building and implementing an internal Corporate Partnerships staff stewardship and recognition strategy that can be implemented by CMN Hospitals and the Corporate Partnerships management team.

Corporate Fundraising Strategy (continued)

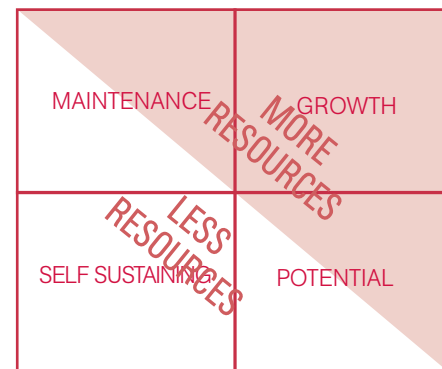
- B. Creating an incubation team whose purpose is to transition new partners through the early development stages of their partnership
 - Create an incubation team that would serve as the day-to-day contact for any new corporate partners and will be responsible for all coordination and development of that partner's interest in CMN Hospitals.
 - Transition all new partners from the new business team and then cultivate those partnerships through the first 3-4 years of the partnership. This affects the coordination all new corporate partnerships regardless of which programs the corporation participates. celebrities, etc.
- C. Building on the success of our collaboration strategy
 - Continue to network the Network through collaboration with the assistance of the CMN Hospitals regional staff.
 - Work with the regional team and the Corporate Partnership team to manage and implement the national collaboration strategy at the local level.
- D. Owning and managing all CMN Hospitals assets that help drive fundraising and awareness.
 - The Corporate Strategy team will package all saleable assets regardless of the internal department ownership of the program or campaign.
 - Assets will be bundled to provide the highest return on investment for CMN Hospitals through sponsorship, recognition, or other means and may include assets in both the U.S. and Canada (i.e. Champions).

Corporate Partner: Sample Growth Plan & Management

1 Examine Growth Potential



2 Allocate Resources



3 Apply Partner Strategies & Long-term Plans

MAINTENANCE <ul style="list-style-type: none"> • Continue to provide a high level of support to high value partnerships. • Provide a menu of fundraising ideas to retain the account • Develop a plan to accelerate growth potential • Create innovative new fundraising approaches 	GROWTH <ul style="list-style-type: none"> • Develop creative and innovative approaches to help launch growth • Create incremental programs
SELF SUSTAINING <ul style="list-style-type: none"> • No allocation of resources • Provide web-based branded support materials • Provide access to hospitals 	POTENTIAL <ul style="list-style-type: none"> • Ensure complete execution of core programs utilizing best practices • Create urgency to move up or out

Program & Event Strategy



**Children's
Miracle Network
Hospitals**

Program & Event Strategy

Current Situation

The Telethon event launched CMN Hospitals to fundraising success in the early 1980s. During one signature weekend, individuals throughout North America were educated, entertained and ultimately asked to support their CMN Hospital. Today, our fundraising programs and events like Radiothon, Dance Marathon, and Extra Life are engaging people on a more personal level through a variety of channels. Because of evolving media, we can now easily activate niches like college students, country music lovers, gaming experts, golfers, etc.—all who have a preferred way to give and be engaged. Program and event donations are typically higher than our retail campaigns and can lead to life-long donor relationships. In 2010, programs raised \$65 million, 28% of our overall fundraising total.

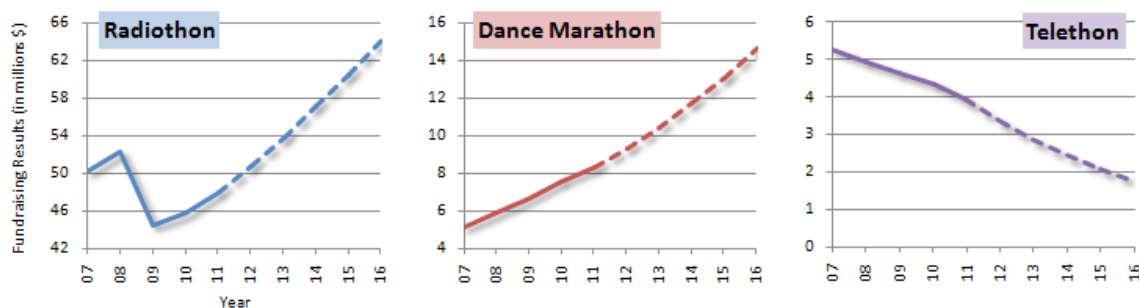
Our fundraising programs have evolved over time; however, there is still unlimited growth and potential as we explore fundraising in the current social/digital world. Besides the growth potential of programs like Radiothon, Dance Marathon and Extra Life, we see a significant opportunity to activate all levels of our Network (hospitals, sponsors, individuals, media partners, celebrities, etc.) in a national signature event, similar to the Telethon, that takes advantage of evolving technologies and communication channels.

HOSPITAL & SPONSOR SURVEY INSIGHTS

- Radiothons and Dance Marathons are often the largest single CMN Hospitals fundraiser for member hospitals.
- Hospitals ranked Radiothon and Dance Marathon as the two most valuable CMN Hospitals programs.
- Sponsors indicated great interest in more fundraising opportunities that involve online fundraising, a one-day national event and cross-promotion with other CMN Hospitals sponsors.
- Hospitals and sponsors have great interest in a national event that could involve all levels of the Network.

CURRENT PROGRAM POTENTIAL

The programs with the greatest growth potential are Radiothon (6% average annual increase) and Dance Marathon (12% average annual increase). Because of the changing nature of TV, Telethon results are decreasing (15% average annual decrease); indicating the need for new innovative thinking in terms of national events that involve all our partners.



NEW PROGRAMS & EVENT POTENTIAL

Gaming is the fastest growing form of entertainment in the world. We expect our new Extra Life gaming marathon to have unlimited potential as we gain support from organizations like Microsoft, Activision, Blizzard Entertainment, Sony, G4, the Warped Tour and IGN.com.

We've already seen the success of national events like Telethon, Miracle Treat Day and National Pancake Day, and believe that a new national event that involves all aspects of the Network could be an exponential success. Other large charities have seen great success with national signature events.

NATIONAL CHARITABLE EVENT SUCCESS

NAME	EVENT	2010 GROSS	EVENTS	PARTICIPANTS
AMERICAN CANCER SOCIETY	Relay for Life	\$416 Million	5,150	3 million
SUSAN G. KOMEN FOR THE CURE	Race for the Cure	\$122 Million	120	1.6 Million
MARCH OF DIMES	March for Babies	\$102 Million	850	220,000

Program & Event Strategy

Overall Strategy: We will grow program and event fundraising opportunities for member hospitals.

1. RADIOTHON

We will grow our Radiothon program by:

- Focusing on new market acquisitions; adding submarket networks for same day events as the primary market
- Expanding Hispanic Radiothon
- Adding new add-on events that open up opportunities with new formats (i.e. "Tee it Up for Kids" and Sports radio).
- Adding new add on events that tap into our radio stations digital assets (i.e. "Friends Helping Friends").
- Targeting new audience segments (i.e. French Language Radiothon in Canada and Urban Radio/Radio One in the U.S.).
- Adding a national Radiothon.
- Growing our Commitment to Kids program.

2. DANCE MARATHON

We will grow our Dance Marathon Program by adding more schools and by:

- Focusing on our acquisition strategy and 20 percent growth strategy for existing programs. (Existing programs are defined as Dance Marathons that have successfully completed two years of activation.)
- Continuing to invest appropriate resources in the program.
- Developing a management and support structure to ensure continued growth in our Dance Marathon program.
- Focusing our efforts in five key areas: 1) Colleges and Universities, 2) High Schools, 3) Young Professionals, 4) Alumni stewardship and retention and 5) A national unifying event for our Dance Marathon Program.
- Examining, testing and driving Dance Marathon models in Canada.
- Creating assets and working with our Corporate Partnerships team on potential sponsorships.
- Working with the Cause Innovation team and Program & Event team leadership to develop new experiential fundraising mechanisms targeting the 5-25 age group.

3. EXTRA LIFE

We will grow Extra Life by:

- Creating a new business unit to support this effort.
- Adding additional gaming partners and creating our version of "Thanks and Giving" for the gaming industry.
- Take lessons learned from Extra Life and create new programs that target readers, moviegoers, snow boarders, etc.
- Selling sponsorships to Extra Life.

4. NEW MEDIA & PROGRAMS

We will grow new programs and events by:

- Applying the learnings from Radiothon to other media distribution systems such as blogs, online newspaper sites, podcasts.
- Creating a community around relevant lifestyle content and then activating that community in an event that is relevant to them.
- Increase resources to execute new programs.
- Exploring celebrity-activated fundraising such as the Donny and Marie Show, Dierks Bentley event and the Justin Bieber event in Buffalo which raised \$150,000 in pennies from high schools that competed for his show.
- Creating and testing new events like virtual house parties, a mommy blog-a-thon, etc.

5. NATIONAL SIGNATURE EVENTS

We will explore the development of national event(s) that foster collaboration among all partners, utilize social and digital technologies, raise awareness of the charitable nature of children's hospitals and engage individuals in our cause by:

- Examining and learning from other successful national events (Relay for Life, Race for the Cure, etc.).
- Applying the success of current programs/events like Radiothon, Dance Marathon, Extra Life, Miracle Treat Day, etc.
- Developing an execution plan that presents a reasonable and actionable timeline.
- Evaluating programs such as Miracle Jeans Day and the So Healthy Challenge to determine whether to continue to invest and build or abandon and move on.

Innovation Strategy



**Children's
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Hospitals**

Innovation Strategy

Current Situation

The nature of fundraising is constantly change. The marketplace offers boundless opportunities for charitable innovation and creativity. To reach the level of growth needed to raise \$1 billion annually, we have to think very differently about what we do and how we do it. We need to think bigger—much bigger.

HOSPITAL & SPONSOR FEEDBACK

Throughout the strategic planning process we consistently received feedback concerning the need to innovate.

- In a recent survey of hospitals and sponsors, all expressed great desire to see increased innovation from the national office.
- When John Lauck met with Walmart USA President and CEO Bill Simon, his top request was for more innovative fundraising ideas.
- During hospital region meetings, one of the top three most requested improvements to CMN Hospitals was increased innovation.
- We are reliant on aging fundraising techniques. (Icon sales are beginning to cause in-store donor fatigue, nature of segmented TV is weakening Telethon, etc.)

EMPLOYEE FEEDBACK & CURRENT STRUCTURE

- In a SWOT analysis done by CMN Hospitals employees, many said lack of innovation was one of our greatest threats as well as one of our greatest opportunities.
- CMN Hospitals does not have structure in place to adequately innovate and test potential fundraising ideas.
- As new ideas come to the forefront they are not always adequately vetted, explored or expanded. We have not dedicated appropriate resources to a "Tomorrow" team.
- A recent test in Canada includes modifying an employee's responsibility to focus half their time on innovation, creativity, partnerships and development of new ideas.



Insight On Innovation

"Hunches that don't connect are doomed to stay hunches....innovation prospers when ideas can serendipitously connect and recombine with other ideas, when hunches can stumble across other hunches. When nature finds itself in need of new ideas, it strives to connect, not protect."

Steven Johnson
Where Good Ideas Come From

Innovation Strategy

Overall Strategy: We will continue to develop innovation as a core element of the CMN Hospitals' culture in order to generate incremental fundraising of \$250 million annually by 2022 for member hospitals/foundations.

1. ORGANIZATIONAL PRACTICES

We will innovate by:

- Allocating resources to a dedicated Cause Innovation team which will focus on evolutionary and revolutionary innovation work.
- Creating innovation opportunities/events to engage staff members in innovation practices which improve fundraising performance across the organization.
- Inviting outside trendsetters and innovators to consult, challenge and encourage new ideas.
- Activating member hospitals, corporate partners, boards and media partners in the innovative process.

2. SCREEN, INCUBATE & TEST IDEAS

We will continue to refine our process of concept screening, filtering and testing fundraising ideas by:

- Creating a quarterly routine of concept testing against well developed benchmarks.
- Engaging employees, member hospitals, corporate partners, boards and media partners in the development and testing of new ideas.
- Launching ideas into the marketplaces only after they have been tested and proven.

3. PRIMARY GOALS OF THE CAUSE INNOVATION EFFORT

We will have the following primary goals for the Cause Innovation effort each year:

- Spread innovative thinking, expertise and enthusiasm throughout the Network
- Develop new fundraising concepts
- Identify high-potential fundraising concepts through regular concept screens
- Prove concepts through in-market tests
- Prepare concepts and plans for launch by the overall organization

SPREADING INNOVATION

Innovation will be spread throughout the Network by infusing innovative thinking and processes into our culture and operations. The Cause Innovation effort will support spreading innovation through regular training, coaching and activities such as Ignite: The Cause Innovation Conference and INNOV8 Week.

THE INNOVATION PROCESS

The Cause Innovation Team has created an innovative process for managing and applying innovation to develop evolutionary and revolutionary concepts. The process is made of five primary parts:

Inspect: During the Inspect process themes, problems, pain points and other areas are explored as ground for innovation development. The team asks the question of "How Might We...?" Themes might include retail fundraising, digital fundraising, national events, youth marketing, etc.

Inflate: In the Inflate element of the process the "How Might We...?" questions are developed and research is conducted to better understand the themes and problems. Data is collected to identify key insights and opportunities.

Ignite: In Ignite, the research and the questions are put to task to develop working concepts and solutions. The team develops hundreds of potential ideas, develops prototypes and puts the most promising concepts through quantitative concept screen.

Tether: Once the concept shows potential it is tested in the Tether phase of the process. Testing may include in-market and in-store tests. Small executions of events or activities designed to gather information and demonstrate viability. In this stage of the innovation process failure is just as important as success.

Launch: When a concept has proven to have strong potential of success it is ready to leave the innovation process and be launched into the organization for daily management and long-term growth. At this point the executive team assigns people and financial resources to concept to help it grow over time.

Awareness/Positioning Strategy



**Children's
Miracle Network
Hospitals**

Awareness/Positioning Strategy

Current Situation

We reviewed and analyzed brand research conducted by Harris Interactive on behalf of Children's Miracle Network Hospitals. We realized an important insight from these studies: children's hospitals in the United States are not always seen as charities in need of philanthropic support.

- Consistent brand research demonstrates U.S. children's hospitals are not top of mind when the general public is asked to name a children's charity. In contrast, Canadian hospitals are some of the most prominent children's charities.
- The focus on major gifts and the competition for patient services are the most likely reasons U.S. children's hospitals have not taken measures to position themselves as local, regional or national children's charities.
- Many large children's hospitals are seeking opportunities, some have invested millions of dollars, to create national charitable brands.
- The CMN Hospitals brand is widely considered as a charitable brand ranked in the top 5 by unaided awareness and enjoying an 75% aided brand awareness.
- The Network serves to care for every child and when a member hospital does not provide the level of care necessary, the child requiring treatment will be referred to the nearest hospital with that capability.

FUNDRAISING AWARENESS EFFORTS

CMN Hospitals strengthens corporate fundraising and other fundraising campaigns through a variety of very successful awareness campaigns. Two examples of awareness success include national activation of the Miss America partnership in support of IHOP National Pancake Day and Miracle Treat Day. Our recent May is for Miracles campaign also garnered great media attention. May marked more than 237 million media impressions in the U.S., with a total publicity value topping more than \$15 million.

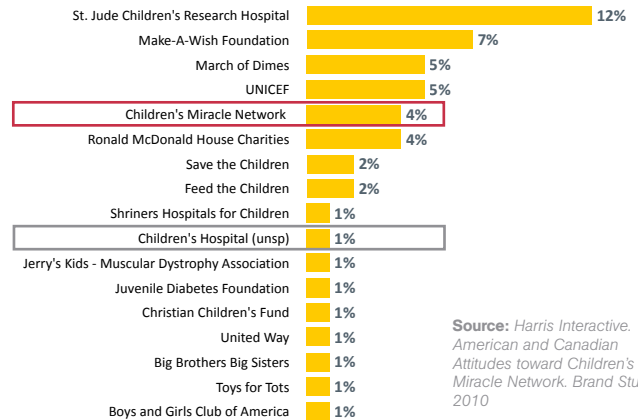
Many of our corporate partners believe that CMN Hospitals can be of the most help in influencing the amount of national and local media/PR attention they receive for their charitable efforts.

BRAND ENHANCEMENT

On January 1, 2011 the brand was enhanced with the addition of word "Hospitals", a new balloon icon and updated imagery. The new CMN Hospitals brand is currently in use throughout the United States. In Canada, the brand continues as Children's Miracle Network featuring the updated balloon icon and imagery at the request of the hospital foundations with sensitivity to public ownership of the children's hospitals.

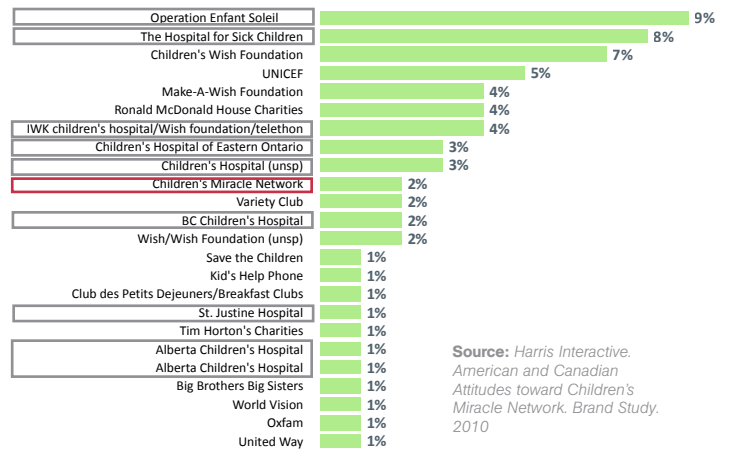
UNITED STATES: UNAIDED AWARENESS FIRST MENTIONS

□ = Member hospital mention



Source: Harris Interactive. American and Canadian Attitudes toward Children's Miracle Network. Brand Study. 2010

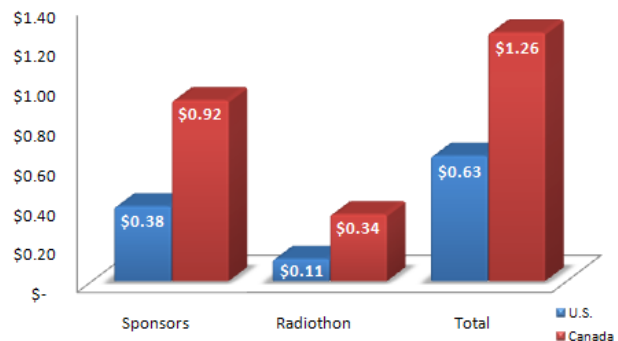
CANADA: UNAIDED AWARENESS FIRST MENTIONS



Source: Harris Interactive. American and Canadian Attitudes toward Children's Miracle Network. Brand Study. 2010

UNITED STATES VS. CANADA PER CAPITA FUNDRAISING

Source: Performance Metrics Reports



Awareness/Positioning Strategy

Overall Strategy: We will generate awareness to position local children's hospitals as critical charitable organizations in need of fundraising support.

1. LEVERAGE CHARITABLE BRAND

As a well recognized international charitable brand we will leverage the position of CMN Hospital to help the public and potential donors recognize the philanthropic need of local children's hospitals and to position them as "charities" in the minds of the public at large. We will investigate the success of our Canadian partners as well as conduct other research and testing methods.

2. EXPLORE NATIONAL MEDIA CAMPAIGN

We will explore and test ways to create and fund a national media plan to increase brand awareness and regard for both the local hospital brand and the CMN Hospitals national brand.

3. CELEBRITY CAMPAIGNS

We seek to secure and develop relationships with appropriate high-profile celebrities to serve as prominent spokespeople for CMN Hospitals and local member hospitals in our PSA and paid media efforts. Stronger emphasis will be placed on creating simple "spokesperson" relationships to front media messaging with "A-List" celebrities knowing they will not likely attend sponsor or hospital events or support specific fundraising activity.

4. STRENGTHEN FUNDRAISING PARTNERSHIPS

We will continue to leverage our awareness efforts to support and recognize all fundraising partners. Awareness efforts will be created to target donors and customers of our fundraising partners as well as to reach key decision makers at potential new fundraising partners.

5. INTERNAL COMMUNICATIONS

CMN Hospitals will implement an Internal Communications strategy designed to streamline communications, educate staff members on organizational activities and priorities, improve staff morale, promote cultural values and recognize key achievements across the organization. The Awareness team will build a new communications vehicle, which will provide a consistent place to engage CMN Hospitals staff in important and key information. The vehicle will also provide a platform for sharing culture-building stories and examples among staff.

6. CMN HOSPITALS WEBSITE

CMNHospitals.org will be a key focus of development for both awareness and fundraising. In the next few years, the web site will be developed to wholly support the awareness and fundraising efforts of CMN Hospitals.

7. DIGITAL COMMUNICATIONS

CMN Hospitals will engage social media, online news outlets and digital partners to build awareness of the charitable need of children among staff.

Community Strategy



**Children's
Miracle Network
Hospitals**

Community Strategy

Current Situation

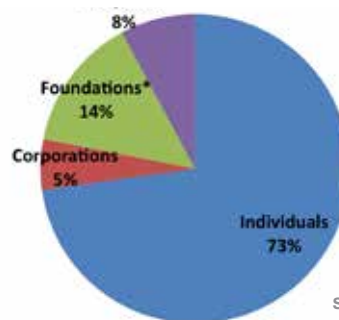
The rise of digital technology is changing the way people connect and build relationships. This is having a profound impact on the way we raise funds. The future demands expertise in fundraising to a market segment of one—the individual. Donors are more savvy and sophisticated in their giving today than at any other time in history. Individuals gave approximately 73% of the \$290+ billion of U.S. charitable giving in 2010.

It is crucial that CMN Hospitals connect personally with donors by meeting them in the channels and mediums where they spend the majority of their time. CMN Hospitals is well positioned with our current programs and partnerships to take the first step toward making those connections on behalf of our member hospitals. We have enormous acquisition opportunities that can help build a community of individuals and donors with an affinity to their local CMN Hospital.

2010 CONTRIBUTIONS

\$290.89 billion by source of contributions

(In billions of dollars - all figures are rounded)



Source: Giving USA 2011

HOSPITAL FEEDBACK INSIGHTS

Member hospitals told us in a recent survey that they ranked unrestricted donations and new donors among the most valuable elements of their membership in the Network. Historically, the Telethon, Radiothon and Direct Mail programs have accomplished both very well. In fact, most of our fundraising programs provide rich sources of new donors as well as potential fundraising organizers and advocates.

DONOR ACQUISITION OPPORTUNITIES

Each of our programs and partnerships are helping build a community of supporters and donors. Our corporate campaigns have raised significant funds through employee, customer and vendor interactions; but there has been little or no effort to capture the names of those who donate to or champion our cause. Dance Marathon also provides a great source of funding and an opportunity to connect with the next generation of donors. We've just recently developed plans to begin capturing the information of the event organizers, participants and donors for the benefit of member hospitals. The Extra Life program is another source for new donor acquisition and community development.

Currently, our social media efforts may not acquire significant donations, but we are building a vibrant community of those who care about children's hospitals. We believe our social community has the potential to champion our cause in a multitude of ways and also become active donors.

HARNESSING THE POWER OF THE INDIVIDUAL

There are literally millions of individuals who contribute small amounts to CMN Hospitals. There are also individuals whose passion for helping children motivates them to organize fundraising events and advocate for CMN Hospitals within their companies and organizations. Connecting and building relationships with these individuals on behalf of our member hospitals represents a big opportunity to grow fundraising, build our community and acquire new donors. Those with an affinity for children's hospitals are also more likely to activate their social networks in support of year-round CMN Hospitals fundraisers and events. Every individual brings value—whether through leadership, organization or contributions—and their influence can help raise even more funds for our member hospitals.

The CMN Hospitals current (and potential) community represents a multitude of demographics: generational (baby boomers, Generation Y, Generation X, etc.), ethnic groups (such as Hispanic and French Canadian), household size, geography, etc.

By focusing on building a community of the people who are already engaged in Children's Miracle Network Hospitals activities and by creating programs that access new market segments, we believe we can bring forward much greater value and fundraising dollars to member hospitals.

Community Strategy

Overall Strategy: We will increase donor acquisition for member hospitals/foundations by identifying, building and activating a community of individuals with an affinity for children's hospitals.

1. ACQUIRE INDIVIDUAL DATA

We will strive to capture the contact information of those who are contributing to and organizing CMN Hospitals' programs and partnerships for the benefit of member hospitals by:

- Building specific data-capture plans into each of our programs and partnerships.
- Creating and upgrading the tools to store, maintain and connect donors and organizers.

2. PROVIDE ACQUISITION DATA TO MEMBER HOSPITALS

We will build mechanisms that give hospitals full access to acquired community data by:

- Providing data in formats that are compatible with the hospital's systems.
- Ensuring user-friendly download tools that make accessing data simple and easy.

3. BUILD AFFINITY

We will create opportunities to connect with individuals in the community in order to build relationships and create affinity for our member hospitals by:

- Developing a communication/execution strategy in collaboration with member hospitals to ensure the success of this new/expanded effort.
- Developing individual engagement guidelines in cooperation with hospitals.
- Defining what existing and new assets fall under this community development strategy.
- Determining missing areas of expertise.

4. LEVERAGE DIGITAL TECHNOLOGY

We will leverage digital technology and social networks to help increase our community of individuals who have an interest in children's hospitals by:

- Increasing the size and impact of the community through all Network activities.
- Moving people up the "Pyramid of Engagement" by establishing measures of affinity, engagement activities, education initiatives and direct interaction.
- Activating and leveraging our community for fundraising and awareness efforts.
- Allocating people and resources to our digital development efforts.

5. MARKET SEGMENTATION STRATEGY

We will allocate more resources to increase fundraising in specific segments of the market by:

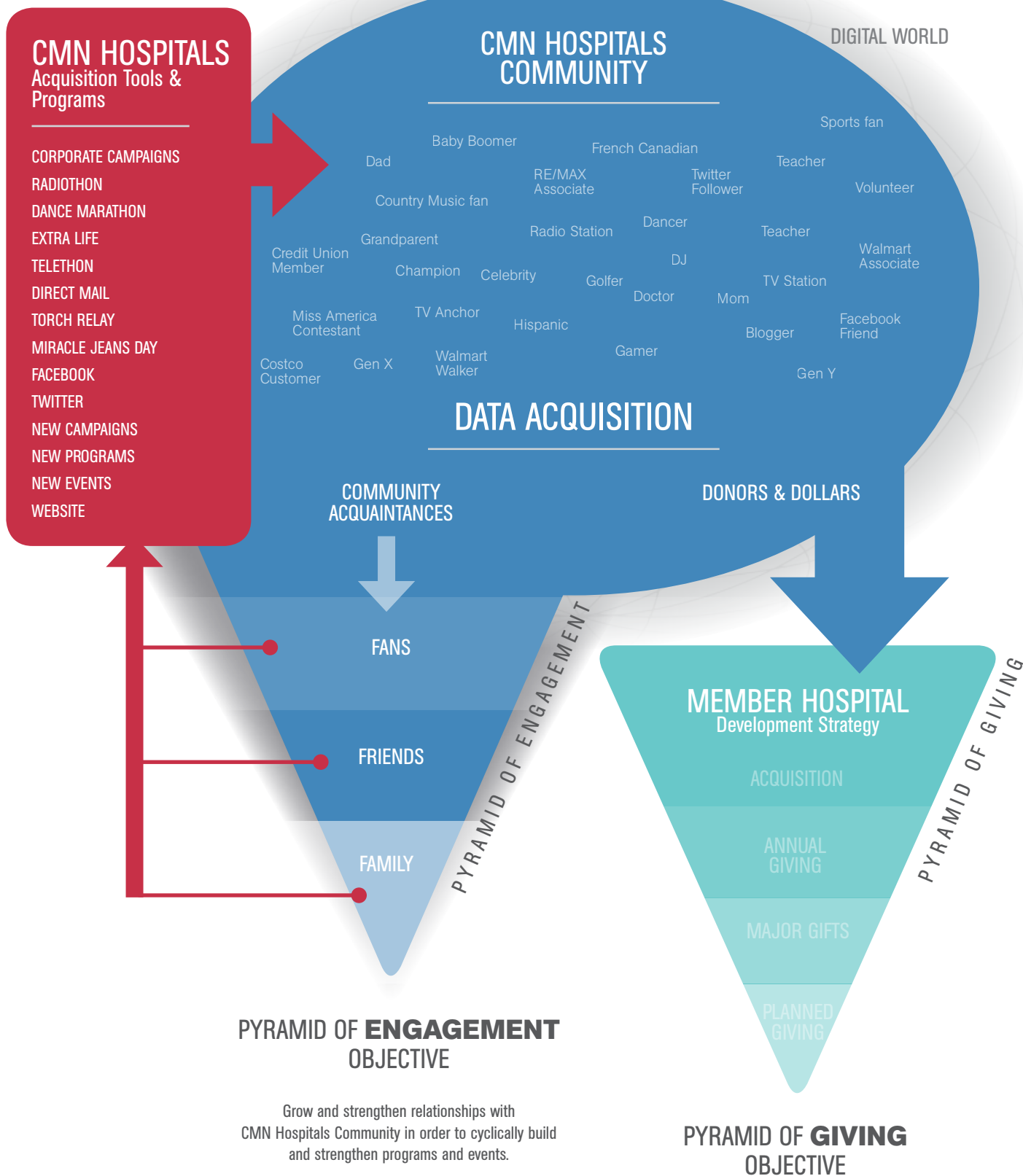
- Researching and developing a plan for the Hispanic market in 2012.
- Beginning execution of Hispanic strategies by 2013.
- Exploring and expanding other segmentation opportunities.
- Developing a life-cycle approach to attract and engage new individuals and corporations

6. MENU OF OPTIONAL DONOR MANAGEMENT TOOLS

We will explore, test and evaluate the possibility of offering additional donor management tools to member hospitals by:

- Engaging member hospitals in a discussion concerning their donor management needs.
- Determining whether enough critical mass exists to aggregate and offer additional services efficiently.

Community Strategy



Operational Strategies












Operational Strategies

- OPERATING PRINCIPLES
- BUDGET STRATEGY
- FIVE-YEAR FUNDRAISING PROJECTIONS
- HUMAN RESOURCE STRATEGY



**Children's
Miracle Network
Hospitals**

Operating Principles

-  **Hospitals/Foundations Are Our Customers**
-  **Funds Stay Local**
-  **Think Global, Act Local**
-  **If It Doesn't Increase Fundraising—Don't Do It**
-  **One Size Doesn't Fit All**
-  **Network The Network**
-  **Ready, Aim, Fire—NOT Ready, Fire, Aim**
-  **Be Accountable**
-  **Communicate**
-  **Be respectful—respond within 24 hours**
-  **We strive for excellence, not perfection.**

Human Resource Strategy

Overall Strategy: We will ensure adequate human resources to meet our strategic goals and operational plans. We will have the right people with the right skills at the right time.

1. SKILLS INVENTORY

We will complete a skills inventory and behavioral analysis for all current employees

2. FORECAST FUTURE NEEDS

We will forecast future Human Resource needs based on the strategic goals of CMN Hospitals

- How many staff will be required to achieve the strategic goals of the organization?
- What jobs will need to be filled?
- What skill sets will people need?
- How will external environment impact our Human Resource needs?

3. IDENTIFY GAPS BETWEEN PRESENT SKILLS AND FUTURE NEEDS

We will determine the gap between current and needed skills identifying the number of staff and specific skills needed to meet the future.

- What new jobs will we need?
- What new skills will be required?
- Do our present employees have the required skills?
- Do we have enough or the right managers/supervisors?
- Are current HR management practices adequate for the future needs?

4. ALIGN HR WITH ORGANIZATIONAL STRATEGIES

We will develop HR strategies to support organizational strategies

- Restructuring strategies
 - Regrouping tasks to create well designed jobs
 - Reorganizing work units to be aligned with our strategy
- Training strategies
 - Providing staff with training to take on new roles
 - Providing current staff with development opportunities to prepare them for future jobs at CMN Hospitals
- Recruitment strategies
 - Recruiting new staff with the skills and abilities and behavioral characteristics CMN Hospitals will need in the future
 - Consider all the available options for strategically promoting job openings and encouraging suitable candidates to apply
- Collaborative strategies
 - Working with our hospital and sponsor partners to prepare future leaders by sharing in the development of promising individuals

Budget Strategy

Overall Strategy: Efficiently increase opportunities to grow fundraising in the future.

1. FUNDING CURRENT GROWTH

As we grow current/traditional initiatives, our funding model will remain the same (membership fee + direct costs of fundraising).

2. FUNDING LONG TERM GROWTH

We will continue to evaluate and explore innovative long-term solutions to funding our growth. Our current operating model will be reviewed and evaluated. We know it will not provide enough resources to achieve the goals outlined in this plan. New funding solutions will need to be researched, developed and introduced over time to ensure we are positioned to deliver aggressive fundraising growth to member hospitals.

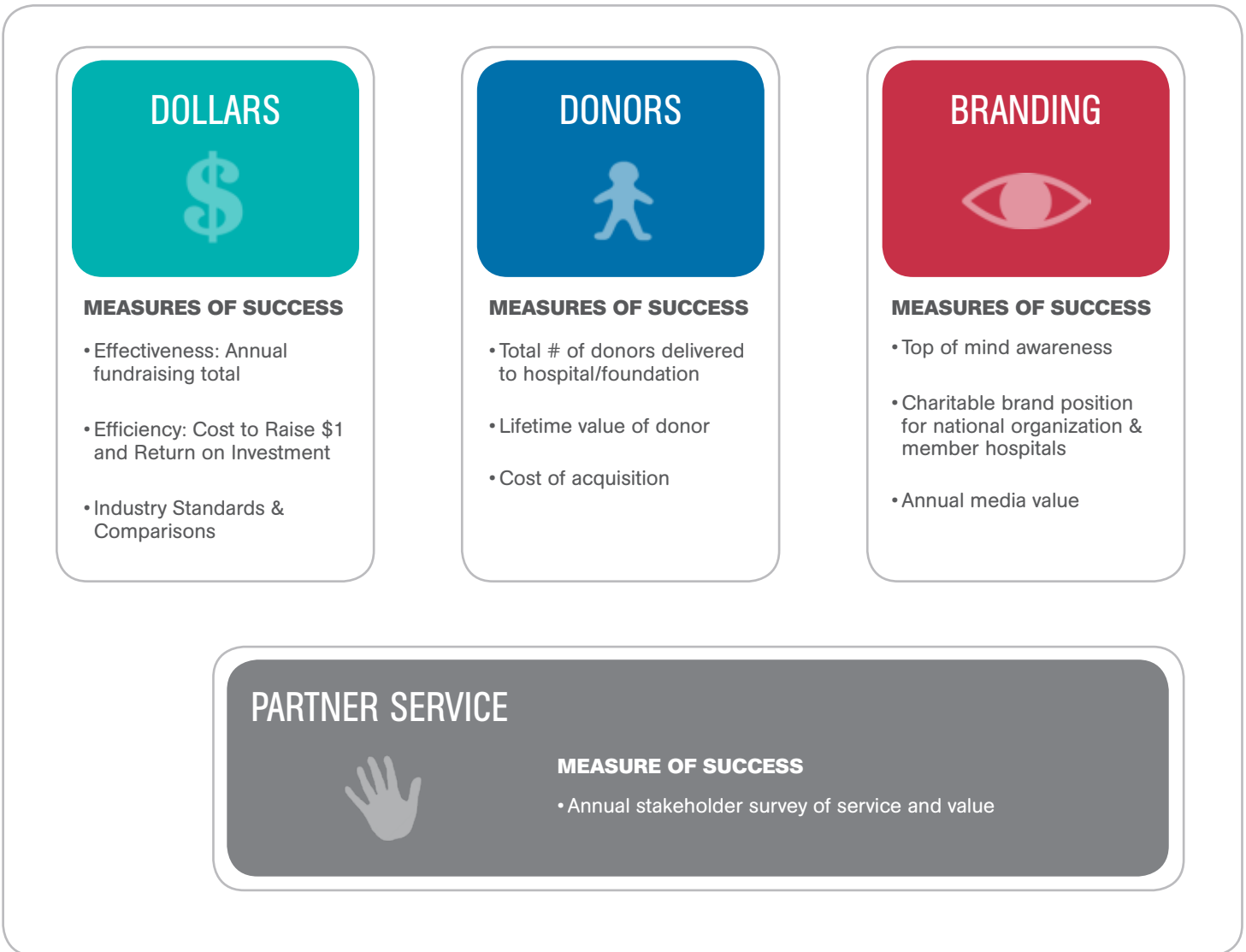
3. FUNDING NATIONAL MEDIA CAMPAIGN

We will test and explore ways to create and fund a national media campaign.

- Explore the question: "How do we acquire \$15-20 million to fund a campaign similar to that of St. Jude, Ronald McDonald House, etc.?"
- (NOTE: Average annual media spend for St. Jude Research Hospital Thanks & Giving campaign = \$14 Million. Average annual media spend for Ronald McDonald House = \$15 Million)

Measurement & Value Proposition

Below is a diagram explaining how we will measure success and hold ourselves accountable to the strategies outlined in this plan.



Fundraising Growth Projections 2011-17

UNITED STATES



US \$ Currency (in Millions)	ACTUALS			GOALS				CAGR
Fundraising Category	2011	2012	2013	2014	2015	2016	2017	2012-17
Corporate Partnerships	\$ 121.8	\$ 145.7	\$ 151.6	\$ 159.6	\$ 171.8	\$ 181.2	\$ 191.2	5.6%
Corporate Underwriting	\$ 7.7	\$ 8.5	\$ 10.7	\$ 9.5	\$ 7.0	\$ 7.4	\$ 7.8	-1.7%
Radiothon	\$ 31.2	\$ 30.0	\$ 30.6	\$ 31.2	\$ 33.0	\$ 33.7	\$ 34.3	2.8%
Hispanic	\$ 6.5	\$ 8.1	\$ 7.1	\$ 9.0	\$ 17.0	\$ 20.7	\$ 25.3	25.4%
Youth/Dance Marathon	\$ 10.7	\$ 13.3	\$ 17.2	\$ 20.5	\$ 23.9	\$ 29.0	\$ 35.3	21.5%
Digital/Extra Life	\$ 1.1	\$ 1.8	\$ 3.5	\$ 4.8	\$ 5.4	\$ 7.2	\$ 9.5	39.1%
National Events	\$ 2.8	\$ 1.5	\$ 2.0	\$ 1.8	\$ 6.8	\$ 9.0	\$ 12.0	50.9%
Telethon	\$ 5.2	\$ 7.0	\$ 6.8	\$ 7.8	\$ 4.8	\$ 5.0	\$ 5.1	-6.0%
Direct Mail	\$ 4.5	\$ 5.9	\$ 6.5	\$ 7.2	\$ 5.5	\$ 5.8	\$ 6.1	0.7%
Cause Innovation	\$ -	\$ -	\$ -	\$ -	\$ 8.0	\$ 13.7	\$ 34.0	106.1%
Local	\$ 29.7	\$ 30.8	\$ 32.8	\$ 34.5	\$ 31.1	\$ 31.7	\$ 32.4	1.0%
Misc	\$ -	\$ -	\$ 2.9	\$ 3.1				
US Total Fundraising	\$ 218.3	\$ 252.6	\$ 271.6	\$ 288.9	\$ 314.3	\$ 344.4	\$ 393.0	9.2%
Annual \$ Change	\$ 23.9	\$ 34.3	\$ 19.0	\$ 17.3	\$ 25.4	\$ 30.2	\$ 48.5	
Annual Growth Rate	12.3%	15.7%	7.5%	6.4%	8.8%	9.6%	14.1%	

CANADA



CA \$ Currency (in Millions)	ACTUALS			GOALS				CAGR
Fundraising Category	2011	2012	2013	2014	2015	2016	2017	2012-17
Corporate Partnerships	\$ 29.3	\$ 30.8	\$ 31.9	\$ 34.6	\$ 37.5	\$ 39.6	\$ 41.7	6.2%
Corporate Underwriting	\$ 0.7	\$ 1.1	\$ 1.1	\$ 0.7	\$ 0.8	\$ 0.8	\$ 0.8	3.7%
Radiothon	\$ 10.5	\$ 9.4	\$ 9.6	\$ 9.7	\$ 9.9	\$ 10.1	\$ 10.4	1.9%
Hispanic	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Youth/Dance Marathon	\$ -	\$ -	\$ 0.01	\$ 0.08	\$ 0.1	\$ 0.2	\$ 0.4	74.7%
Digital/Extra Life	\$ 0.1	\$ 0.3	\$ 0.6	\$ 0.8	\$ 1.3	\$ 1.8	\$ 2.4	52.4%
National Events	\$ -	\$ 0.0	\$ 0.0	\$ 0.0	\$ 0.1	\$ 0.1	\$ 0.2	33.0%
Telethon	\$ 5.2	\$ 6.5	\$ 6.0	\$ 6.2	\$ 5.2	\$ 4.8	\$ 4.5	-7.0%
Direct Mail	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Cause Innovation	\$ -	\$ -	\$ -	\$ -	\$ 0.5	\$ 0.8	\$ 1.0	41.4%
Local	\$ 0.1	\$ 0.1	\$ 0.2	\$ 0.2	\$ 0.1	\$ 0.1	\$ 0.1	-2.9%
Misc	\$ -	\$ -	\$ 0.0	\$ 0.0	\$ 0.0	\$ 0.0	\$ 0.0	0.0%
Total Fundraising	\$ 45.9	\$ 48.2	\$ 49.4	\$ 52.3	\$ 55.5	\$ 58.3	\$ 61.4	5.0%
Annual \$ Change	\$ 6.0	\$ 2.3	\$ 1.1	\$ 2.9	\$ 3.2	\$ 2.8	\$ 3.2	
Annual Growth Rate	15.1%	5.0%	2.4%	5.9%	6.2%	5.0%	5.4%	

CONSOLIDATED FUNDRAISING TOTALS



	ACTUALS			FORECAST				CAGR
Fundraising Category	2011	2012	2013	2014	2015	2016	2017	2012-17
United States	\$ 218.3	\$ 252.6	\$ 271.6	\$ 288.9	\$ 314.3	\$ 344.4	\$ 393.0	9.2%
Canada (in US currency)	\$ 46.5	\$ 48.2	\$ 49.4	\$ 52.3	\$ 55.5	\$ 58.3	\$ 61.4	5.0%
Network Total (in US \$)	\$ 264.7	\$ 300.8	\$ 320.9	\$ 341.2	\$ 369.8	\$ 402.7	\$ 454.4	8.6%
Annual \$ Change	\$ 30.3	\$ 36.1	\$ 20.2	\$ 20.2	\$ 28.6	\$ 32.9	\$ 51.7	
Annual Growth Rate	12.9%	13.6%	6.7%	6.3%	8.4%	8.9%	12.8%	

Fundraising Growth Projections 2018-22

UNITED STATES



US \$ Currency (in Millions)	GOALS					CAGR	
Fundraising Category	2018	2019	2020	2021	2022	2018-22	2012-22
Corporate Partnerships	\$ 211.8	\$ 234.5	\$ 259.5	\$ 286.8	\$ 317.6	10.7%	8.1%
Corporate Underwriting	\$ 8.7	\$ 9.7	\$ 10.8	\$ 12.0	\$ 13.3	11.2%	4.5%
Radiothon	\$ 35.0	\$ 35.7	\$ 36.3	\$ 37.1	\$ 37.8	1.9%	2.3%
Hispanic	\$ 30.8	\$ 35.1	\$ 40.0	\$ 45.6	\$ 52.0	15.6%	20.4%
Youth/Dance Marathon	\$ 42.7	\$ 51.5	\$ 61.6	\$ 74.5	\$ 90.1	20.6%	21.1%
Digital/Extra Life	\$ 12.7	\$ 16.8	\$ 22.5	\$ 29.8	\$ 39.7	33.0%	36.0%
National Events	\$ 16.0	\$ 21.3	\$ 28.3	\$ 37.6	\$ 50.1	33.0%	41.7%
Telethon	\$ 5.2	\$ 5.3	\$ 5.4	\$ 5.4	\$ 5.6	1.8%	-2.2%
Direct Mail	\$ 6.4	\$ 6.7	\$ 7.0	\$ 7.4	\$ 7.8	5.0%	2.8%
Cause Innovation	\$ 50.3	\$ 74.8	\$ 110.9	\$ 164.3	\$ 242.6	48.2%	62.8%
Local	\$ 33.0	\$ 33.7	\$ 34.4	\$ 35.0	\$ 35.7	2.0%	1.5%
Misc	\$ -	\$ -	\$ -	\$ -	\$ -		
US Total Fundraising	\$ 452.8	\$ 525.1	\$ 616.7	\$ 735.6	\$ 892.1	17.8%	13.4%
Annual \$ Change	\$ 59.8	\$ 72.4	\$ 91.6	\$ 118.9	\$ 156.6		
Annual Growth Rate	15.2%	16.0%	17.4%	22.6%	25.4%		

CANADA



CA \$ Currency (In Millions)	GOALS					CAGR	
Fundraising Category	2018	2019	2020	2021	2022	18-22	2012-22
Corporate Partnerships	\$ 46.0	\$ 50.7	\$ 55.9	\$ 61.9	\$ 67.8	10.2%	8.2%
Corporate Underwriting	\$ 0.8	\$ 0.9	\$ 0.9	\$ 0.9	\$ 1.0	4.3%	-0.5%
Radiothon	\$ 10.6	\$ 10.8	\$ 11.1	\$ 11.3	\$ 11.6	2.3%	2.1%
Hispanic	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
Youth/Dance Marathon	\$ 0.8	\$ 1.60	\$ 3.2	\$ 4.5	\$ 6.3	73.6%	80.7%
Digital/Extra Life	\$ 3.1	\$ 4.2	\$ 5.5	\$ 7.4	\$ 9.8	33.0%	42.4%
National Events	\$ 0.2	\$ 0.3	\$ 0.4	\$ 0.6	\$ 0.7	31.7%	32.0%
Telethon	\$ 4.2	\$ 3.9	\$ 3.6	\$ 3.4	\$ 3.1	-7.1%	-7.1%
Direct Mail	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
Cause Innovation	\$ 1.5	\$ 2.0	\$ 3.0	\$ 4.5	\$ 7.5	0.0%	0.0%
Local	\$ 0.1	\$ 0.1	\$ 0.1	\$ 0.1	\$ 0.1	0.0%	-1.4%
Misc	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
Total Fundraising	\$ 67.3	\$ 74.5	\$ 83.7	\$ 94.6	\$ 107.9	11.9%	8.4%
Annual \$ Change	\$ 5.9	\$ 7.2	\$ 9.2	\$ 10.9	\$ 13.3		
Annual Growth Rate	9.5%	10.7%	12.4%	14.6%	15.9%		

CONSOLIDATED FUNDRAISING TOTALS



	GOALS					CAGR	
Fundraising Category	2018	2019	2020	2021	2022	18-22	2012-22
United States	\$ 452.8	\$ 525.1	\$ 616.7	\$ 735.6	\$ 892.1	17.8%	13.4%
Canada	\$ 67.3	\$ 74.5	\$ 83.7	\$ 94.6	\$ 107.9	11.9%	8.4%
Network Total	\$ 520.1	\$ 599.6	\$ 700.4	\$ 830.2	\$ 1,000.0	17.1%	12.8%
Annual \$ Change	\$ 65.7	\$ 79.6	\$ 100.8	\$ 129.8	\$ 169.9		
Annual Growth Rate	14.4%	15.3%	16.8%	18.5%	20.5%		

Contributors

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Gracie Martinez - CHRISTUS Santa Rosa Children's Hospital
Greg Williamson - Riley Hospital for Children
Jennifer Kaczinski - Children's Hospital Boston
Karen McClure - Duke Children's Hospital and Health Center
Kira Haller - Children's Hospital and Regional Medical Center
Marla Moldes - Miami Children's Hospital
Sue Nicol - Doernbecher Children's Hospital Foundation
Tom Sullivan - Children's Memorial Hospital Chicago (BOT)

CANADIAN CHILDREN'S HOSPITALS FOUNDATION EXECUTIVES

Aniele Lecoq - Hospital Sainte-Justine Foundation
Brynn Boback-Lane - Children's Hospital Foundation of Saskatchewan
Debbie Comuzzi - Children's Health Foundation
Frederick M. Bartlett - CHEO Foundation
Jennifer Wood - Stollery Children's Hospital Foundation
Lesia Sianchuk - Children's Hospital Foundation of Manitoba
Louise Dery-Goldberg - La Fondation de l'Hôpital de Montréal pour enfants
Lynn Sparkes - Janeway Children's Hospital Foundation
Margaret Martinello Magner - IWK Health Centre Foundation
Pearl Veenema - Hamilton Health Sciences Foundation
Saifa Koonar - Alberta Children's Hospital Foundation
Ted Garrard - SickKids Foundation
Teri Nicholas - BC Children's Hospital Foundation

CMN HOSPITALS - Hospital Representatives

Contributed through surveys, town hall discussions, focus group and one-on-ones.

CMN HOSPITALS - Sponsor Representatives

Contributed through surveys, town hall discussions, focus group and one-on-ones.

CMN HOSPITALS - Employees

Contributed through surveys, town hall discussions, focus group and one-on-ones.

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