

# Contents

Appendix A: 21 Key geo-markets & their sub-regions ..... 1  
Appendix B: Surfacing the key geo-markets ..... 4  
Appendix C: Dashboards for the key geo-markets ..... 5

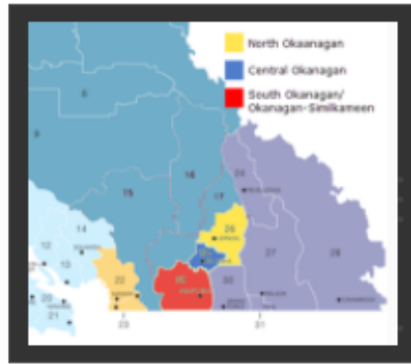
## Appendix A: 21 Key geo-markets & their sub-regions

Ex:



Figure A1

Ex: The definition and composition of the Okanagan geo-market & its sub-regions:



## 2. Geo-Market: Okanagan

The region in southern B.C. surrounding and including the City of Kelowna. The Okanagan is considered an Established Market.

### Geo-Market Sub-Regions:

Central Okanagan  
North Okanagan  
South Okanagan/Okanagan Similkameen

### Geo-Market Main City:

City of Kelowna

### Communities include:

Communities Included in North Okanagan	
Armstrong (City of)	Lavington
Cherryville	Lumby (Village of)
Coldstream (Municipality of)	North Okanagan B, C, D, E, F
Enderby (City of)	Okanagan Indian Reserve No. 1
Enderby Indian Reserve No. 2	Priest's Valley Indian Reserve No. 6
Grindrod	Spallumcheen (Municipality of)
Harris Indian Reserve No. 3	Vernon (City of)

Communities Included in Central Okanagan	
Central Okanagan	Oyama
Duck Lake 7	Peachland (District of)
Ellison	Tsinstikeptum 9, 10
Fintry	West Kelowna (City of)
Kelowna (City of)	Westbank
Lake Country (District of)	Winfield
Lakeview Heights	

Communities Included in South Okanagan	
Ashnola 10	Marron Valley
Alexis 9	Naramata
Blind Creek 6	Okanagan Falls
Cawston	Okanagan-Similkameen A, B, C, D, E, F, G, H
Chopaka 7, 8	Olalla
Chuchwayha 2	Oliver (Town of)
Coalmont	Osoyoos (Town of)
Eastgate	Osoyoos 1
Hedley	Penticton (City of)
Inkaneep	Penticton 1
Kaleden	Princeton (Town of)
Keremeos (Village of)	Summerland (Municipality of)
Manning Park	Tulameen

Figure A2

Ex: An example of one of the tools, QGIS, that was used as part of the Geo-mapping process to create custom polygons of the key markets after definitions of each area were created.

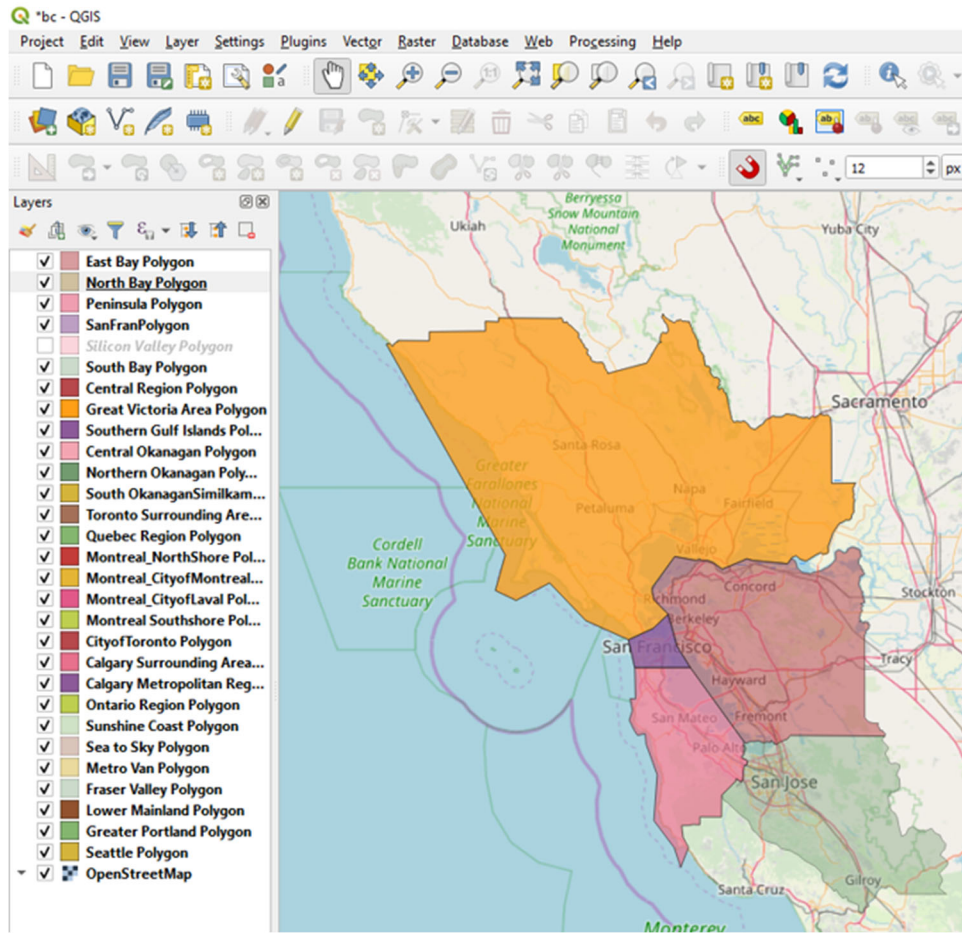


Figure A3

## Appendix B: Surfacing the key geo-markets

**Ex: User interface customization of our Blackbaud CRM's address view to include the geo-market(s) that the address corresponds to:**

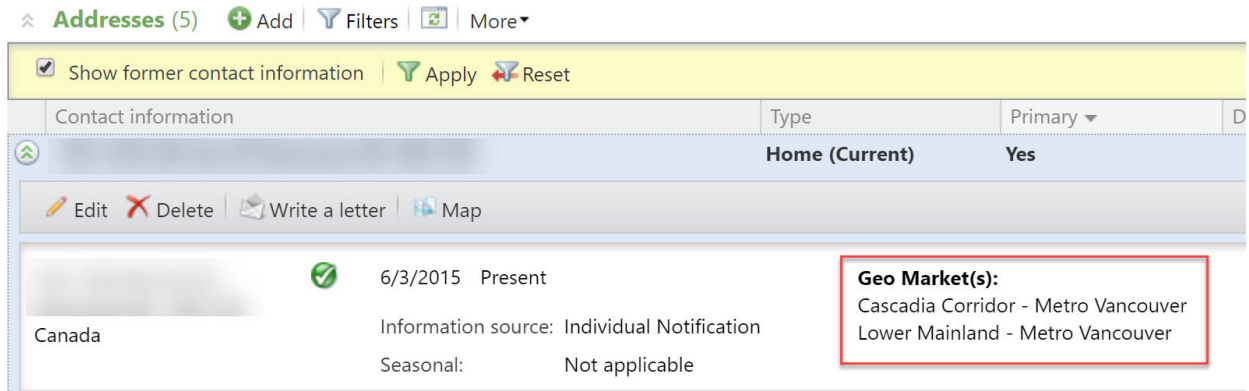


Figure B1

**Ex: Surfacing the geo-market data in our self-serve ad-hoc querying tool**

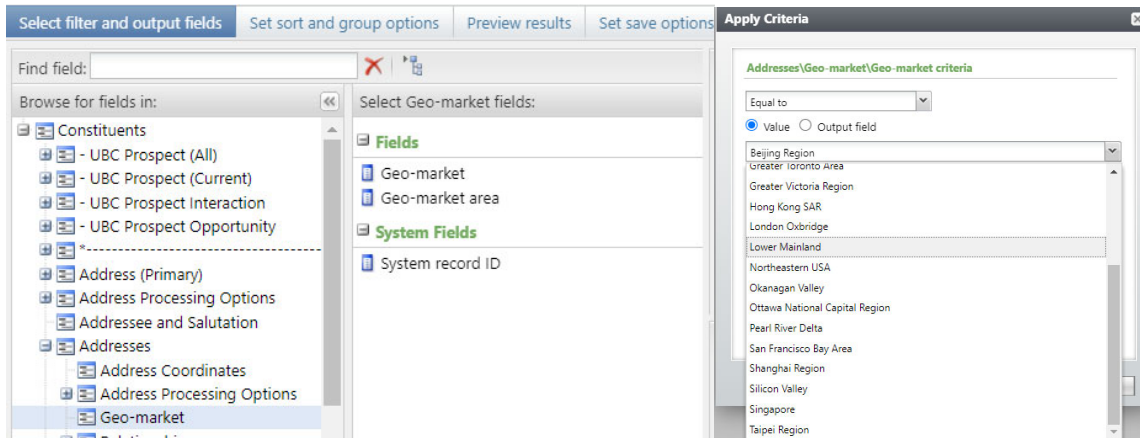


Figure B2

# Appendix C: Dashboards for the key geo-markets

**Ex: A high level representation of the Okanagan geo-market (one of the 21 key geo-markets) and its 3 sub-regions**

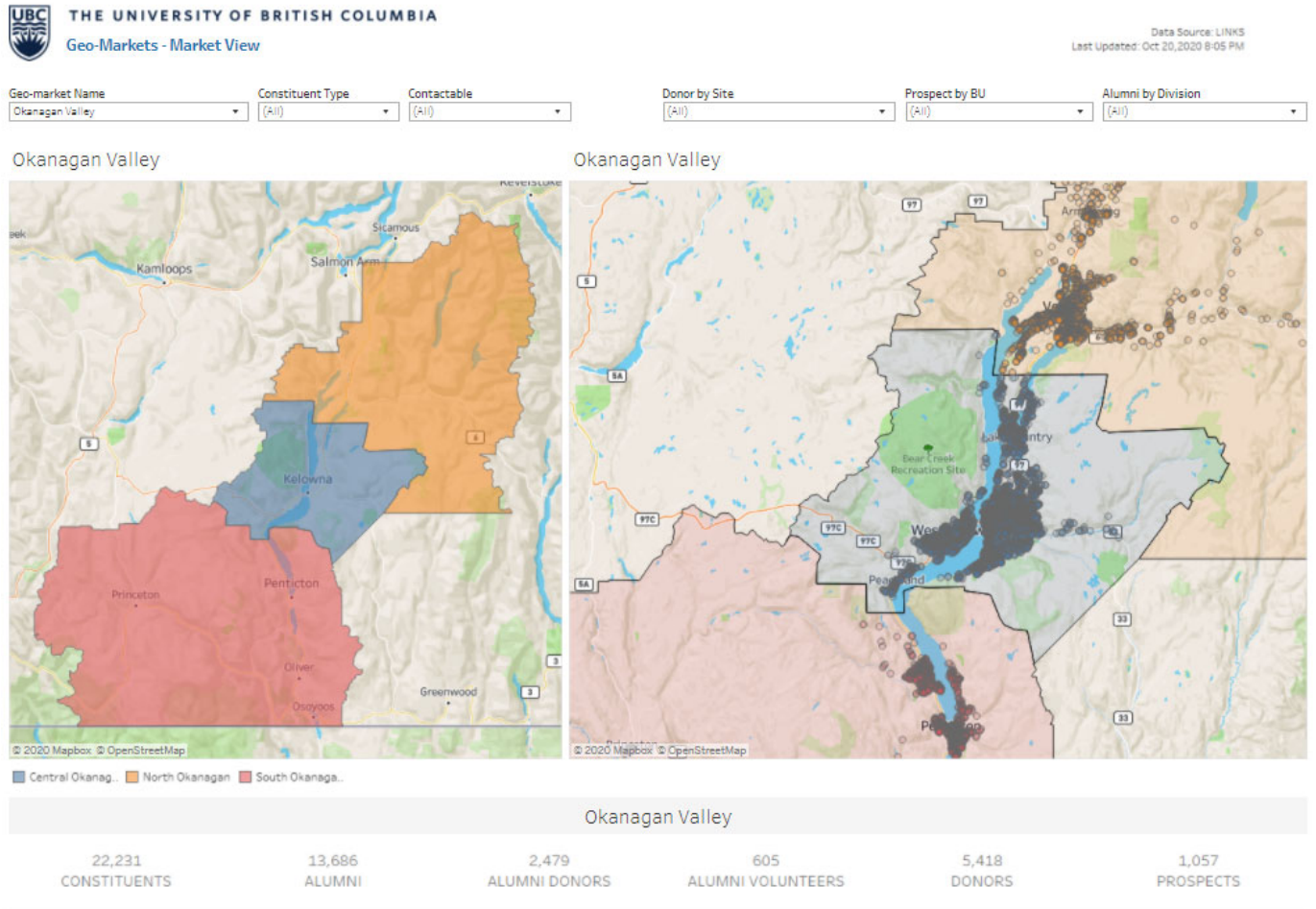
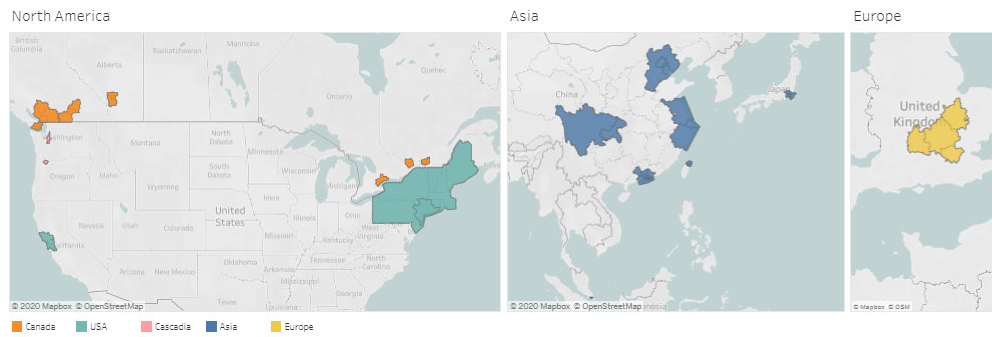


Figure C1

# Ex: High level stats of the geo-markets at a global view

Constituent Type:  Contactable:   
 Donor by Site:  Prospect by BU:  Alumni by Division:



CONSTITUENTS	ALUMNI	ALUMNI VOLUNTEERS	ALUMNI DONORS	DONORS	PROSPECTS
Lower Mainland	249,926	164,888	12,385	38,587	79,688
Cascadia Corridor	242,805	160,243	12,135	37,322	77,305
Greater Toronto Area	16,679	13,686	505	3,383	6,017
Okanagan Valley	22,231	9,145	583	2,475	5,921
Greater Victoria Region	14,840	8,555	401	2,197	5,438
Calgary Metropolitan Reg.	10,956	5,238	254	1,541	2,744
Ottawa National Capital R.	4,328	2,520	200	848	1,802
Pearl River Delta	3,679	2,517	199	487	1,388
Northeastern USA	3,470	2,455	105	453	1,152
San Francisco Bay Area	3,382	1,731	102	444	1,033
Greater Montreal Region	3,149	1,551	80	440	691
Greater New York City	1,824	1,551	75	399	590
Silicon Valley	1,228	763	63	244	585
Greater Tokyo Area	922	675	59	192	365
Shanghai Region	922	650	46	69	144
Singapore	547	392	32	35	104
Greater Tokyo Area	365	529	22	53	69
Beijing Region	390	395	20	46	62
Taipei Region	469	304	11	23	58
London Oxbridge	224	145	7	19	34

Figure C2

**Ex: Before and after the geo-markets have been implemented**

**Before: the prospects are only shown at city-level**

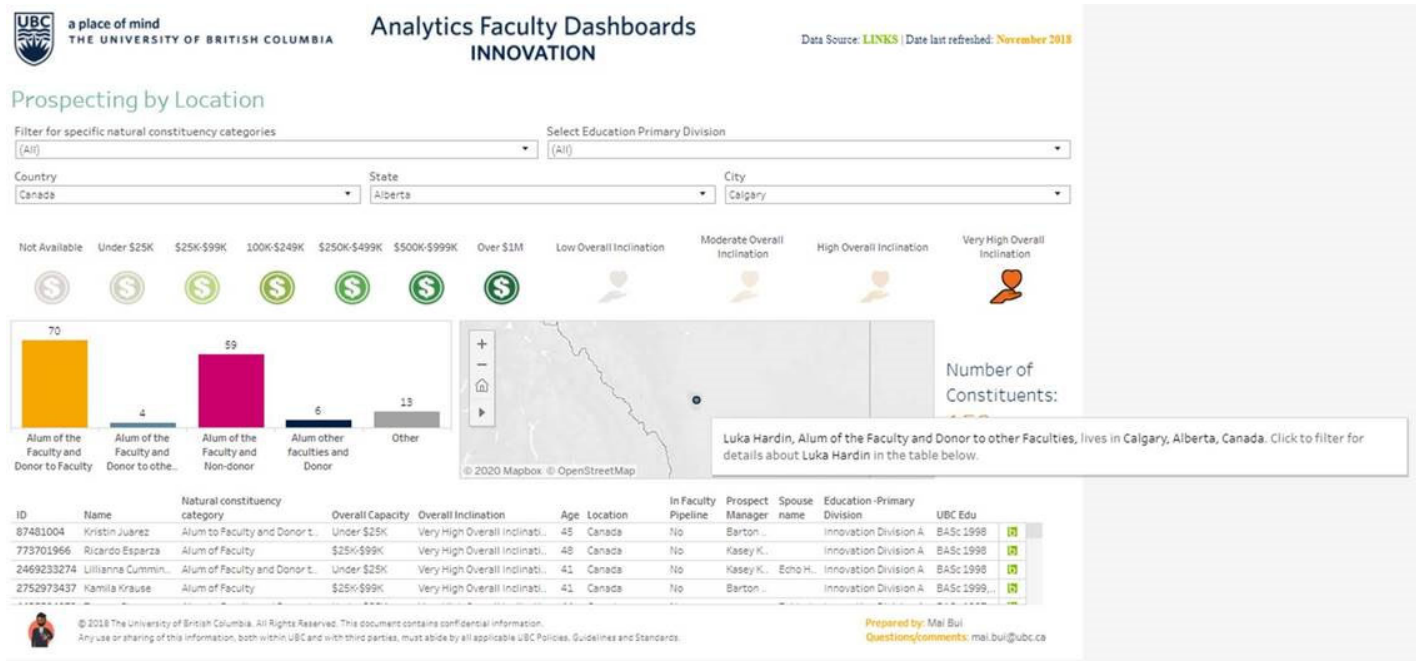


Figure C3.1

**After: the prospects are shown at street level**

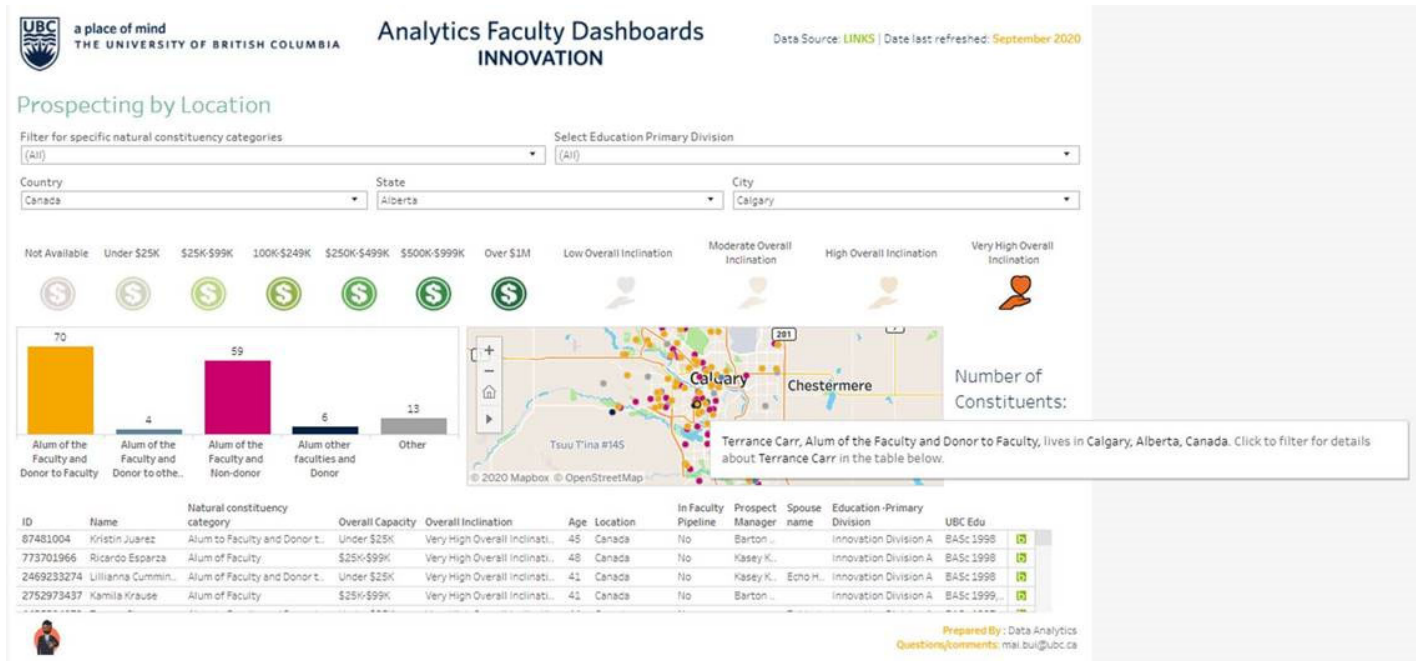


Figure C3.2

**Ex: Dashboard at world/global level and various data filters for further granularity**

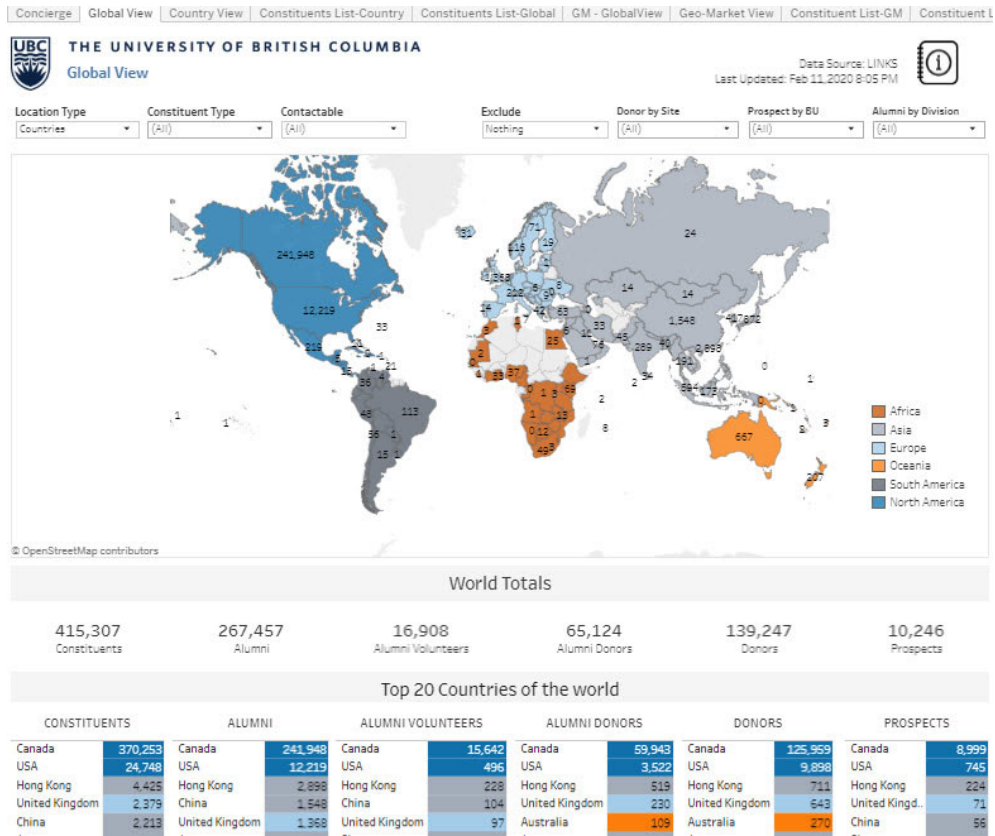


Figure C4



## Ex: Dashboard at key geo-market level and various data filters for further granularity

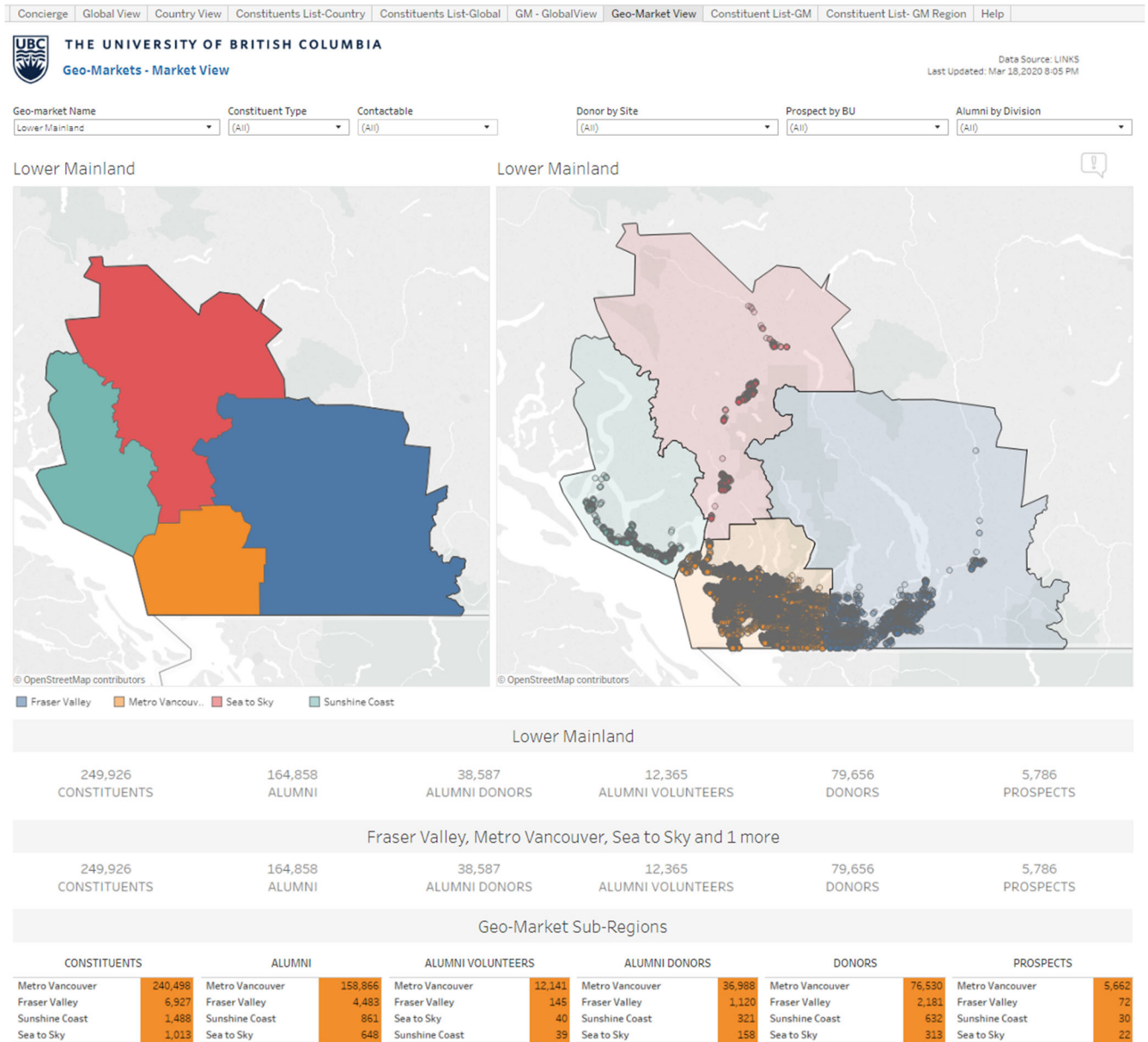


Figure C5


Ex: Front page of the dashboards, offering a Concierge desk to point the end user in the right direction

**UBC THE UNIVERSITY OF BRITISH COLUMBIA** **Location Dashboards**

**Concierge desk**


The initial dashboard will be a prototype that will provide users with some very high level numbers and allow us to explore the possibilities Tableau dashboards provide. Once complete, additional dashboards will be created that will target specific use cases and groups: **Alumni, fundraising, stewardship, and events.**

**How can I help you get started today?**




**Global View**

I want to explore constituents in multiple countries or compare constituent numbers between countries or international cities



**Country View**

I want to explore constituents within a single country or compare constituent numbers between cities within a country



**Geo-Markets**

I want to explore constituents within our key geo-markets

Additional Information

Definitions of all geo-markets can be found on Daelphi ⓘ

An FAQ on using the Location Dashboards can be found on Daelphi ⓘ

Figure C6

Ex: Tool tip example with more insights on a particular geo-market, as well as links to email the data team, or view and export a list of constituents in that geo-market

North America

**Canada**

**Geomarket: Calgary Metropolitan Region**

Constituents: 3,277

Alumni: 1,433

Average total points: 38

Average last 3 years points: 19

# of Alumni with points: 1,116

Alumni Donors: 1,433

Alumni Volunteers: 67

Donors: 1,433

Average Min Gift: \$467

Average Max Gift: \$13,473

Lifetime Recognized: \$170,648,613

Prospects: 149

[Email LINKS Helpdesk](#)

[View Keymarket Dashboard](#)

[View List of Constituents](#)

	CONSTITUENTS	ALUMNI	ALUMNI VOLUNTEERS
Lower Mainland	67,093	31,568	3,928
Cascadia Corridor	65,001	30,493	3,858
Greater Toronto Area	4,004	20,000	1,000
Greater Victoria Region			
Okanagan Valley			

Figure C7