

**Population Selection/Export/Report Criteria Worksheet**

Submitted by: \_\_\_\_\_

Desired outcome:  Popsel or  Custom Export/Report

Date Request is Needed: \_\_\_\_\_

Brief description of project:  Mail or  E-mail?

1. Select Constituent Category(s)

- LU Alumni Class(es): \_\_\_\_\_  MD Alumnae Class(es): \_\_\_\_\_
  - Parents of Class(es): \_\_\_\_\_ or  Parents of Current Students or  Parents of Alumni
  - Friends  Faculty  Staff  Students, class(es): \_\_\_\_\_
  - Other \_\_\_\_\_
- Include Spouses?  Yes or  No

2. Select Donor History Look at:  Lawrence Fund Giving  Björklunden Giving  All Giving

- Current Fiscal Year (Year 0):
- Gift or  No gift  Pledge or  No Pledge  Specific designation: \_\_\_\_\_
  - Amount requirement: \_\_\_\_\_
- And /  Or:
- Last Fiscal Year (Year 1):
- Gift or  No gift  Specific designation: \_\_\_\_\_
  - Amount requirement: \_\_\_\_\_
- And /  Or: (custom description)

3. Note Other Criteria

4. Inclusion/Exclusion by Codes:

- Is mail solicitable?  Yes  No
- Is mailable?  Yes  No
- Is email solicitable?  Yes  No
- Is emailable?  Yes  No
- Has email exclusion (EMA)?  Yes  No
- Is phone solicitable?  Yes  No
- Other \_\_\_\_\_

Solicitation Code to Set:

WorkZone Project Number:

Additional Comments:

5. Exclusions by Group:

- Current Trustees  and Spouses
- Emeriti Trustees  and Spouses
- Founders Solicitor Org.
- Parent Solicitor Org.
- Milestone Reunions or specific Reunion Class(es): \_\_\_\_\_
- Cluster Reunions or specific Reunion Class(es): \_\_\_\_\_
- Viking Decade Classes
- Viking New Grads (most recent graduated class)
- Counts as Donor for \_\_\_\_\_ fiscal year
- Other \_\_\_\_\_