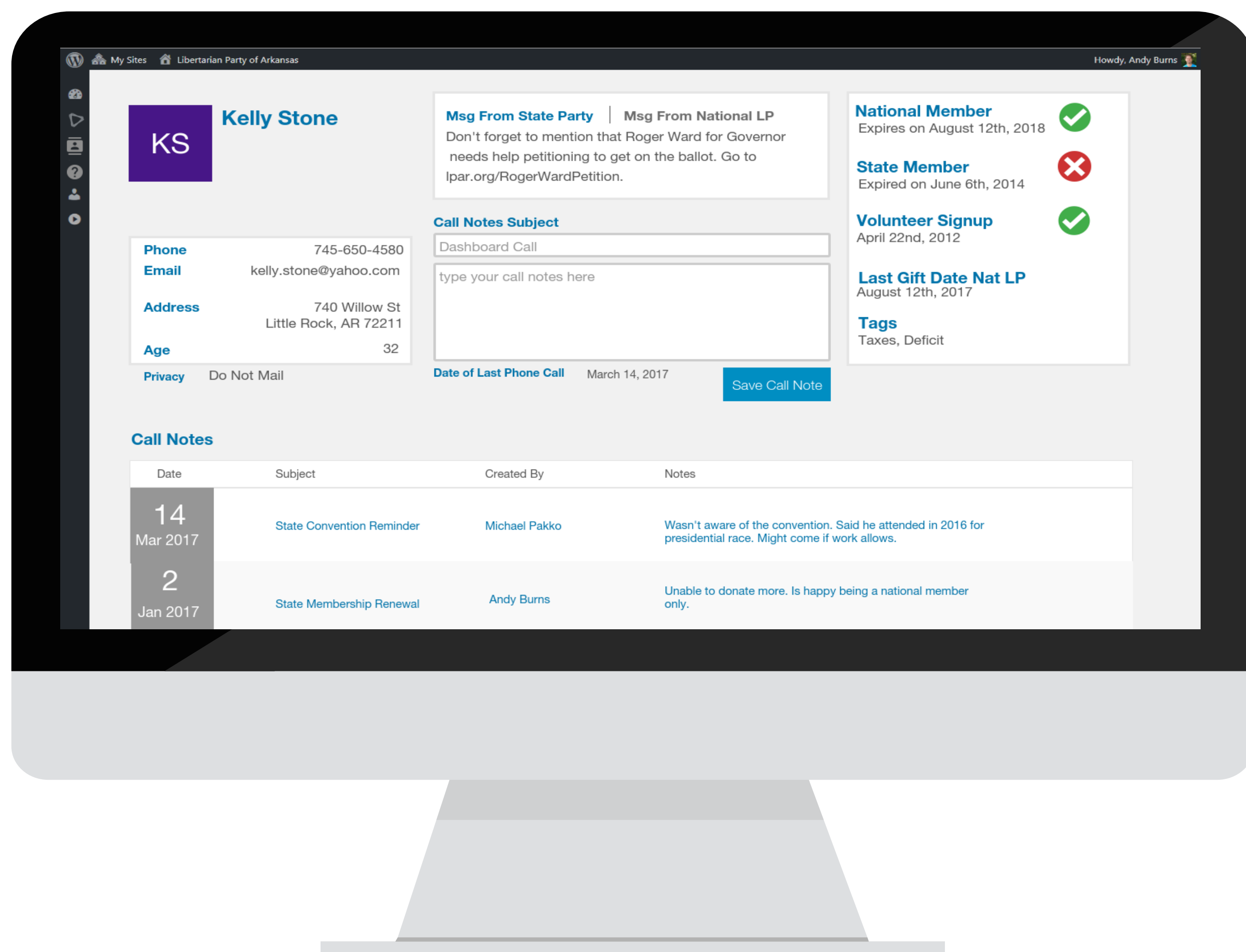# LIBERTARIAN

STATE CRM PROJECT

More engagement, greater results: growing state affiliates through effective data management

Created by

Andy Burns
Affiliate Development Specialist

What We've Done	What's Next
✓ POC Phase completed	✓ Work with open-source community to develop shared tools
✓ Established relationships with partner orgs	✓ User dashboard
✓ 4 states have access	✓ RE automated data loads
✓ Core functionality implemented	✓ Mailing program optimized
✓ Researched major custom development options	✓ Other Phase 2 projects
	✓ Adding more states

Strategy

We are developing functionality in conjunction with CiviCRM LLC and the open-source ecosystem that sustains and grows it as the #1 non-profit open-source Constituent Relationship Management System. The model is one where contributors/orgs feed off and assist each other to enable their organizations to succeed. Why? This removes the burden of any one organization having to maintain the software all on their own.

A key tenet to the work is eliminating redundancy whenever possible. With affiliates, there are plenty of opportunities for this. This also greatly aids in maintaining the system. The project is being managed by Sean O'Toole and myself.

Vision

Create a system that allows volunteers to interact with data without needing to be technologically savvy. Simplified. Not complicated. Intuitive and doesn't require much training (we send them a video tutorial). Geared towards making phone calls and following up with members/supporters.

- Leverage affiliates to bring in new members
- States maintain donor and voter data under CRM umbrella
- States focus on sales and not on back office operations
- Convert registered Libertarians into members
- Increase turnout at events
- Increased fundraising totals for affiliates
- Eventually, enable much greater synergy between the LNC and states

Platform

CiviCRM is our powerful engine with a sophisticated data model, providing a broad base of functionality covering contributions, memberships, email, text messaging, events, reporting and more. On the front-end, Wordpress matches our existing platform for states / national and gives us the ease of use required for volunteers.
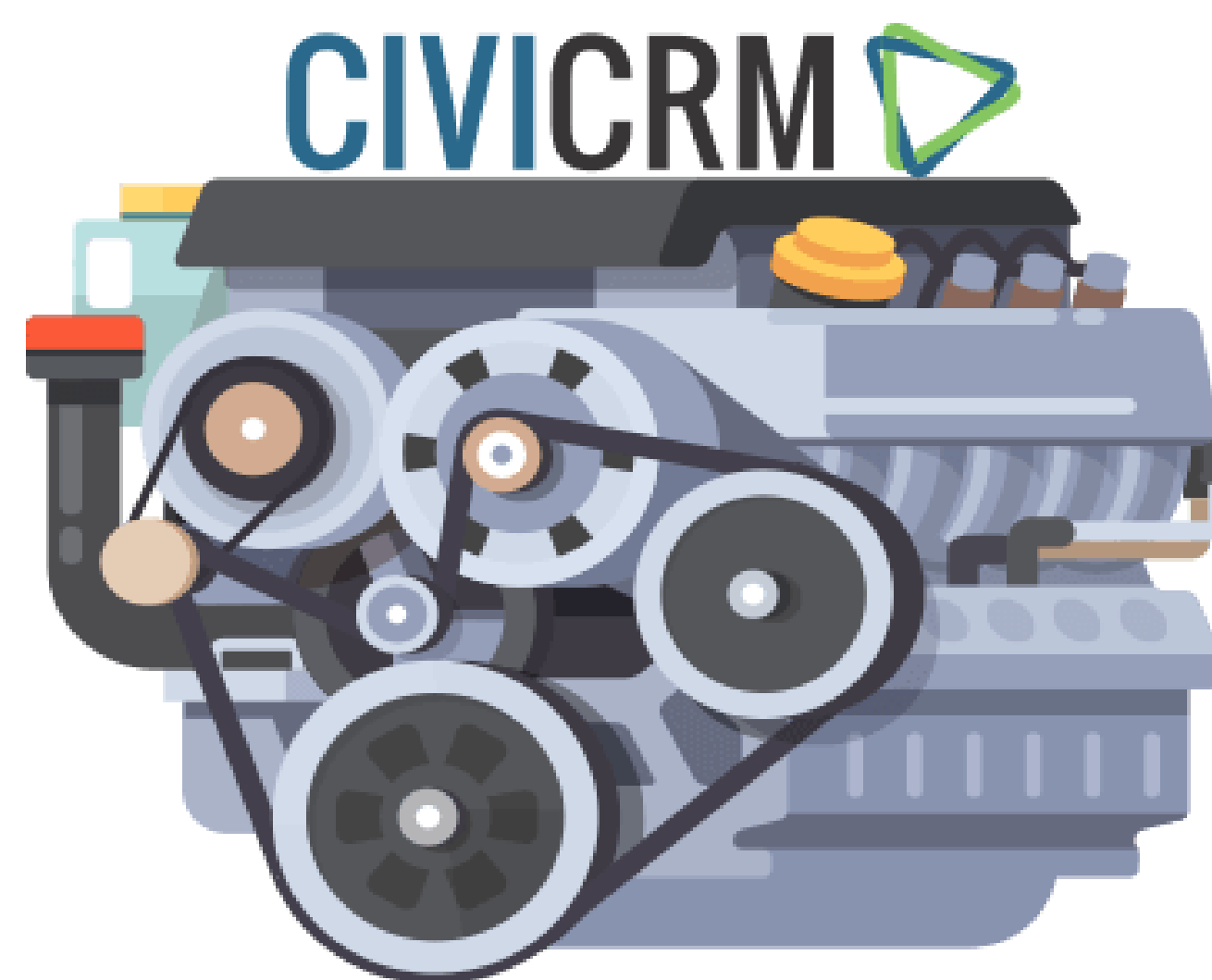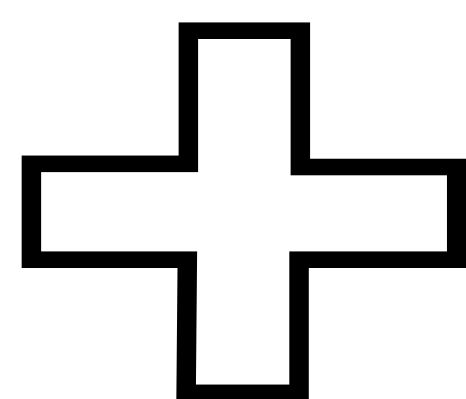
Ecosystem of Partners

It's vitally important to bring in the right ingredients into this project. The LNC does not have the expertise alone, so we have partnered with 2 groups, CiviHosting and Back Office Thinking. We use Civihosting for monthly software upgrades, hosting, support, ensure out-of-the-box functionality works and resolving any bugs. Back Office Thinking takes the lead on custom development, consulting on strategies on the use of the CRM and the source we escalate any issue to if not resolved by others. We also communicate with the LNC IT Committee.

Progress Summary

We started work in late August of 2017 after the LNC approved a $5,000 allocation. We secured our hosting and consultant partners. There are 4 pilot states currently on the CRM service during the "Proof-of-Concept"(POC) phase. This measured approach will allow for us to gather enough user feedback while allowing future state additions to be brought on with ease.

We've gotten a lot done on a very small budget. We've been prudent with spending and cautious on custom development work until we are confident in the given direction. Much of the work thus far has been shouldered by myself. Doing the configuration setup and bringing the states online with the core services is well within my capabilities and has been a major place of cost savings. There has been a few times when we could have out-sourced but through careful research we have saved thousands of dollars. In the end, there will be some big-ticket items we need funding for, but these cost saving elsewhere helps us devote the necessary funding to these custom items.

We have spent $4,015 for the following: data and import planning, closing user loopholes to enhance data security, mass email tracking links fix, tying a state's CMS and CRM sites together and conducting discovery (specifications) for major Phase 2 sub-projects.

Top leadership in the 4 states were given access on Nov 20th. A major thanks goes to Ken Moellman and Sean O'Toole for their IT expertise in planning various aspects of the system.

In summary, we have a functional system in place but much work remains. We have learned a lot through research and thoughtful deliberation on user experience. We've considered a handful of different directions on major aspects of the system. By gathering multiple quotes, talking with the CiviCRM community and Core Team we've achieved more clarity on our direction.

We will continue these discussions and finalize vendors for various sub-projects within the month of January. It is our goal to empower affiliates at both the county and state level to leverage and therefore improve the data in a wise fashion, have smart geo-access control permissioning to the county level, have a user dashboard that gives users key data on volunteers and members in a easy to use fashion and sync the national database to the state database in an automated way. These sub-projects will be laid out at the end of the report. Investing in these tools is paramount to making volunteering a productive experience to grow the party and elect more Libertarians nationwide.

Cost Comparisions

This Project

$70K one-time cost

$12K max operating
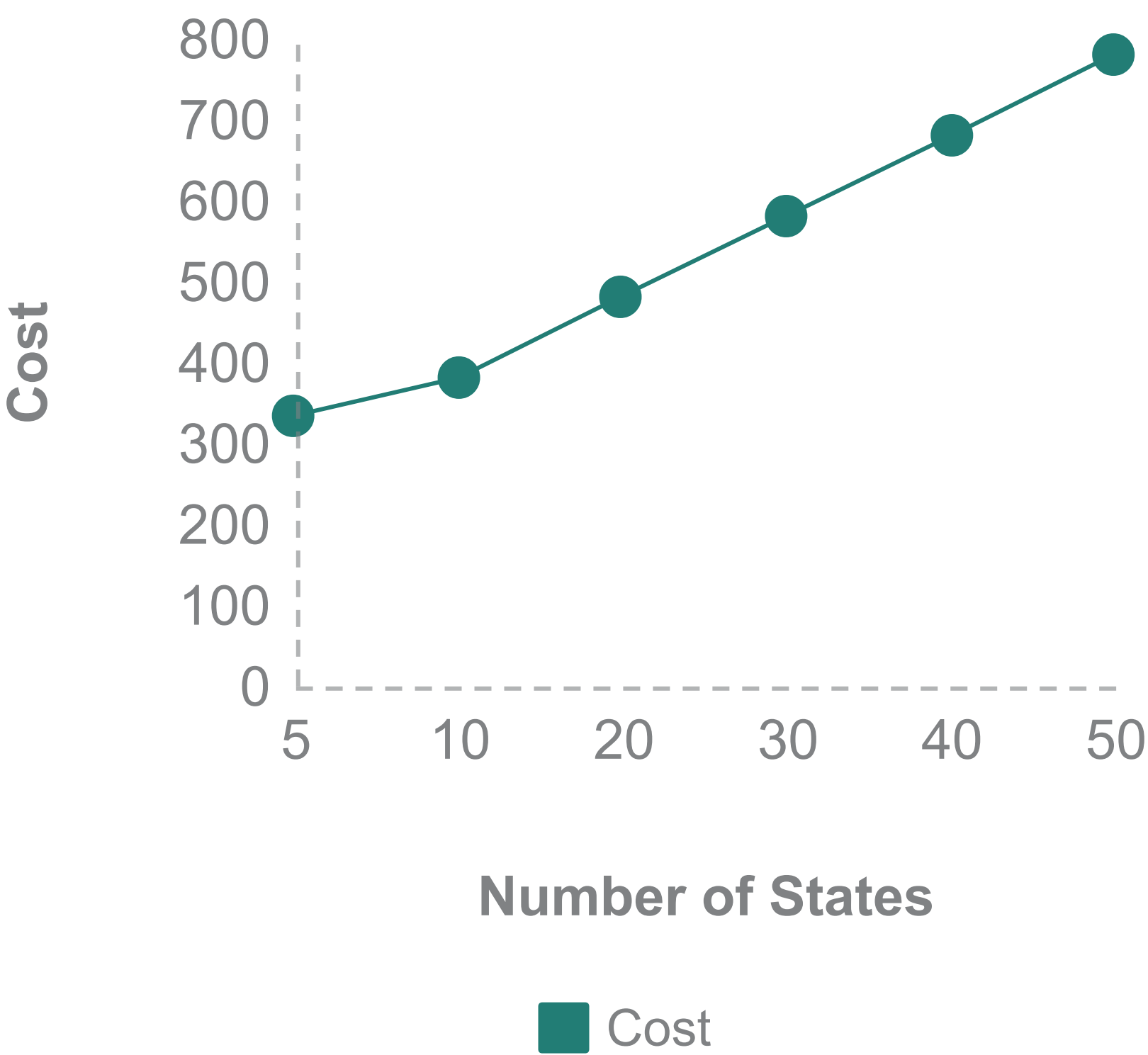
✓

Other Project Proposals

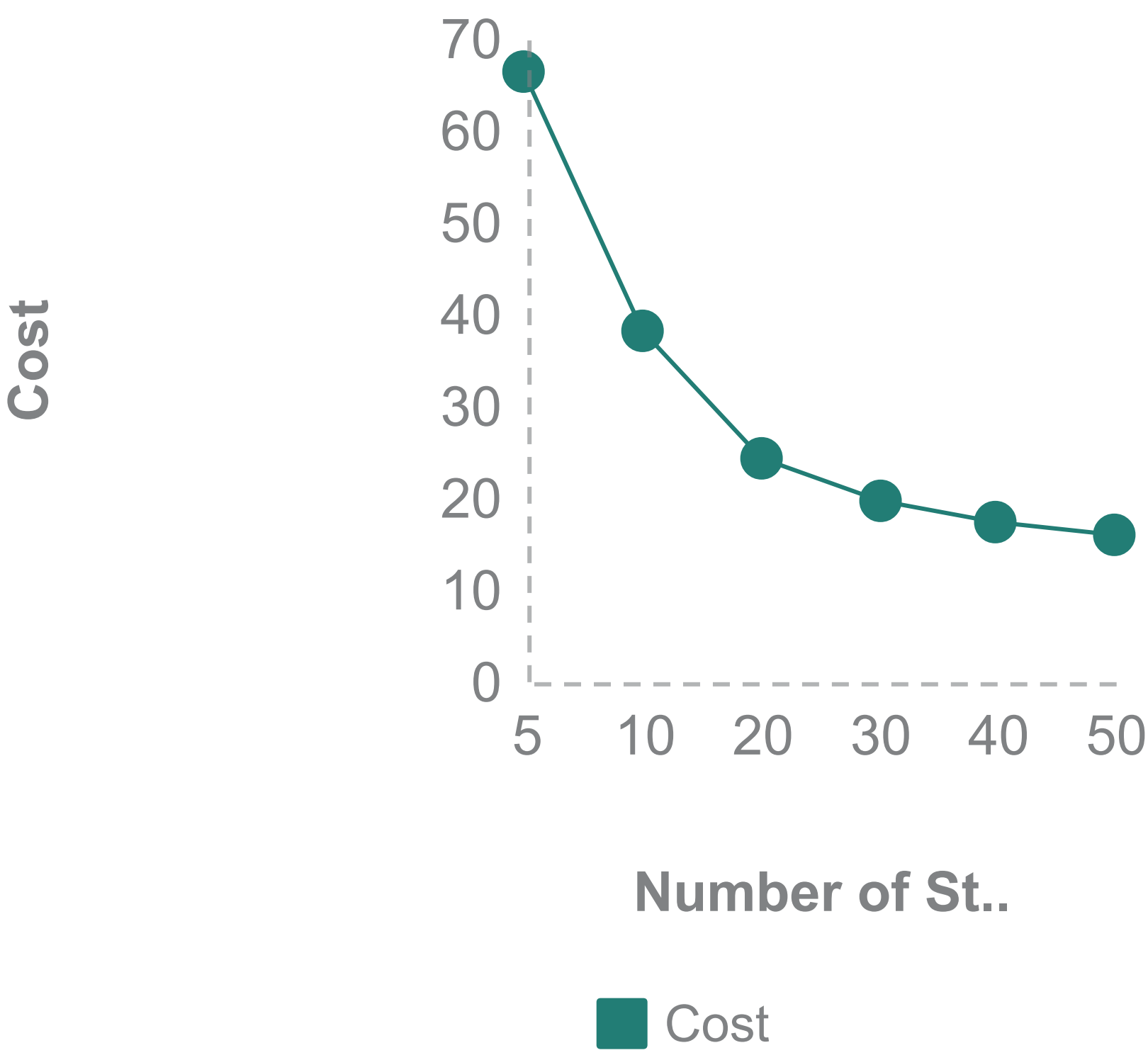Range from $100K-
$140K annual cost

✗

The key to our success is proper planning. The other proposals previously would include software from NationBuilder or Raiser's Edge that would give us similar functionality.

Operating Costs

Total Operating Cost

Number of States

■ Cost

Additional Cost to add a State

Number of St..

■ Cost

The current monthly operating costs is $330. The other cost to factor in is my time. Much of that is up-front work and specifying to our partners what requirements we have. This will lessen as the platform matures.

Key Points of Progress

Proper Infrastructure | Contributions | Accommodates external data sets | Solid data integrity | User Wiki | Candidate Case Management

Proof-of-Concept Goals Met

We've checked off many core needs during this POC phase. At the end of the day, we have a functional system that is operating and all state users are able to search for contacts on a variety of parameters and log email and phone call actions.

We have also gotten further ahead in some areas that were planned for Phase 2, which includes setting up mass-email capability and state membership tracking for states. Arkansas has been our primary state to implement new functionality on. You can see how it works by visiting lpar.org and clicking Donate or Signup. Once it is implemented on one state, it is trivial to do so on another.

We have laid the foundation with a Wordpress multisite configuration sharing a single CRM database on a CiviCRM-managed hosting partner.

Proper Infrastructure

A fundamental component to scaling the CRM for affiliates is to allow for proper permissioning. This reaps benefits as it eliminates redundancy that separate systems would otherwise create.

State-Level Permissioning

We've focused on bringing in 3 key data sources. First, the monthly data dumps that states get in Excel are now transformed into the CRM. Secondly, registered Libertarians from Aristotle. And lastly, the state supporter lists and new signups from the front-end of the sites are now also feeding into the CRM.

Data Imported

Closed Data Security Loopholes

When you have many users (and brand-new volunteers) nationwide using the system, you have to prepare for the worst. In this manner, we removed some loopholes that could have hurt data integrity.

We have contribution pages live for Arkansas and will be bringing on the other states in the next month.

Contribution Pages

Candidate Case Management

With the goal of 2,000 candidates in 2018, I worked with Cara Schulz (Candidate Recruitment Specialist) in setting up a case management system to identify at what stage a candidate is in. This will increase the effectiveness and efficiency in attaining this goal. In addition, the new landing page is at my.lp.org/run, with more effective marketing to motivate members to run.

Other Items In Progress

We are about 70% of the way there configuring mass email within the CRM. Our end goal here is to include a MailChimp like "Drag-n-Drop" builder so state volunteers can easily put together effective email communication.

Mass Email
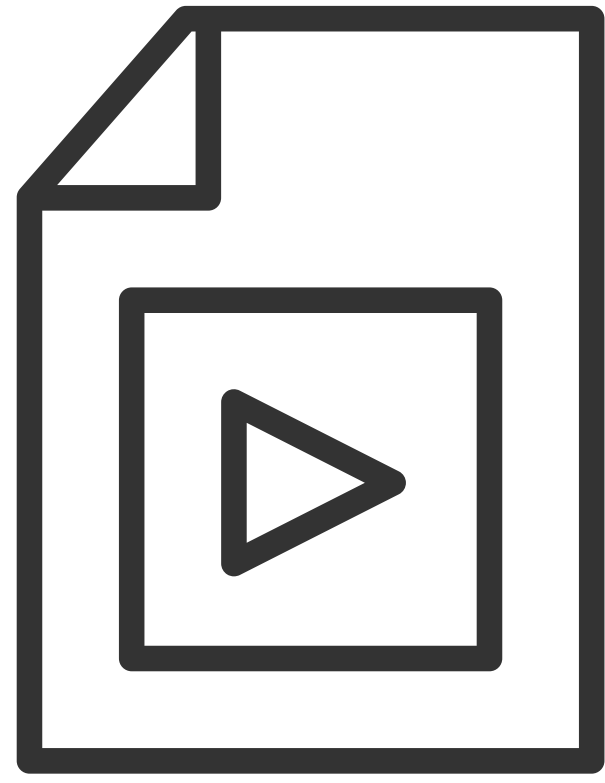
User Wiki

We have started a wiki platform within the system so users have quick answers while lessening the burden on staff. We've incorporated a video format for each area. This will be expanded as we get user feedback and complete the finished product.

LP CRM Helpdesk

We're here to help.

What can I help you with?

GETTING STARTED

Contact Dashboard
Your User Dashboard

More →

COMMON ACTIONS

Following Up With Incoming Signups
Logging A Phone Call
Adding A New Individual
Performing Basic Searches

More →

POLICIES

End User Terms of Use
Service Agreement

More →

Dashboard

Screen Options ▾   Help ▾

CRM Helpdesk ▲

Need Help? Please login to our CRM HelpDesk knowledge base for videos and support. The helpdesk is at crmhelpdesk.lp.org/wiki

Note you will login with the same credentials. Once logged in, you will be able to navigate in-between both your CRM and our Wiki site.

If you cannot find the answer you are looking for or want to chat with other users, please go to our #crm_project channel in our Libertarian Party Slack group. We are also available by email at affiliates@lp.org.

Message From The LNC ▲

National Convention Delegation

Do not forget that National Convention delegation counts are determined by Dec 31st. You can signup members here and support the CRM project.

Affiliate Discount at LPStore.org

Affiliates can use the coupon code **affiliate17*** to get 33% off all items in the apparel category at lpstore.org.

Candidate Support ▲

Please share the LP Candidate Workbook with your candidates. If you need assistance regarding recruiting candidates, please email Candidate Recruitment Specialist, Cara Schulz.

User Dashboard

Summary

This will provide a simplified user interface for volunteers. It will remove the barriers of using the CRM and logging data into the platform.

- Geo-based Access Control
- New contact record screen shows only key data (e.g. we do not want to share all of our data with a new county volunteer yet we still want to give them tools to succeed)
- One view that is able to be filtered easily along frequently searched data points
- Simplified look and feel
- A "Call These People" phone queue
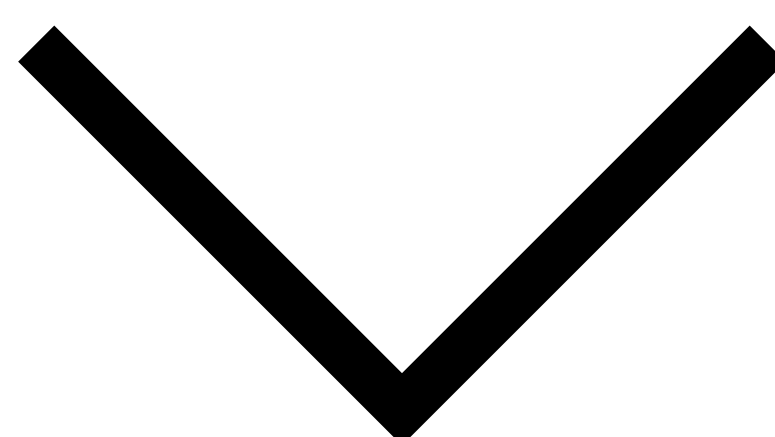
Benefits

- Log phone calls quickly
- Re-engage aging contacts to cultivate new members and volunteers
- Follow-up with incoming leads
- Reach out to their county contacts for various initiatives

Alternative Approach to Gathering Funding for the User Dashboard

We are continuing to explore the best route to acquire funding and to ensure proper maintenance of any custom development we do. This would entail finding other nonprofit organizations willing to pledge financial support for dev and annual maintenance of plugin/extension

Example: To achieve 50K in funding: Find 20 organizations to share dev and maintenance cost. Pitch to organizations: $2,500 to develop $250 annual to maintain.

Below are a couple mockups

Contacts [Add New]

Active National Members	Active State Members	Volunteers
789	**375**	**251**

[Search Contacts]

Search Operator

(●) And ( ) Or

Members   **Membership Status**

[Select Membership ▾]   [Select Status ▾]   ☐ Donor   ☐ Volunteer   [Filter]

☐	Name	Phone	Email	City▾	County▾	Last Phone Call▾	Volunteer
☐	Barry Livingston	745-650-2160	barrywhite@gmail.com	Little Rock	Pulaski	October 31st, 2017	✋
☐	Kelly Stone	745-650-4580	kstone@yahoo.com	Roland	Pulaski	June 2nd, 2017	
☐	Jennifer Wrigley	745-260-1059	jwrigley@hotmail.com	Maumelle	Pulaski	November 1st, 2016	✋
☐	Ron Edwards	-	ronedwards@gmail.com	Jacksonville	Pulaski	-	
☐	Ashley Jacobs	612-462-2074	ashleyj12@gmail.com	-	-	August 16th, 2015	

KS   Kelly Stone

Msg From State Party | Msg From National LP

Don't forget to mention that Roger Ward for Governor needs help petitioning to get on the ballot. Go to lpar.org/RogerWardPetition.

National Member ✅
Expires on August 12th, 2018

State Member ❌
Expired on June 6th, 2014

Volunteer Signup ✅
April 22nd, 2012

Last Gift Date Nat LP
August 12th, 2017

Tags
Taxes, Deficit

Phone	745-650-4580
Email	kelly.stone@yahoo.com
Address	740 Willow St Little Rock, AR 72211
Age	32

Privacy   Do Not Mail

Call Notes Subject

[Dashboard Call]

[type your call notes here]

Date of Last Phone Call   March 14, 2017   [Save Call Note]

Call Notes

| Date	Subject	Created By	Notes
14 Mar 2017	State Convention Reminder	Michael Pakko	Wasn't aware of the convention. Said he attended in 2016 for presidential race. Might come if work allows.
2 Jan 2017	State Membership Renewal	Andy Burns	Unable to donate more. Is happy being a national member only.

Cost: $51,000

Mass Email and Proper Permissioning

Summary

We currently need funding to have affiliates access only their mailing lists. We have email sending functioning and other core functionality. We also need some assistance with integrating the drag-n-drop editor on a multisite.

Benefits

- Full integration with CRM data - ability to segment and use tokens to personalize messaging
- Email activity is logged
- No hassle with syncing with outside third party email service
- Drag-n-Drop Editor
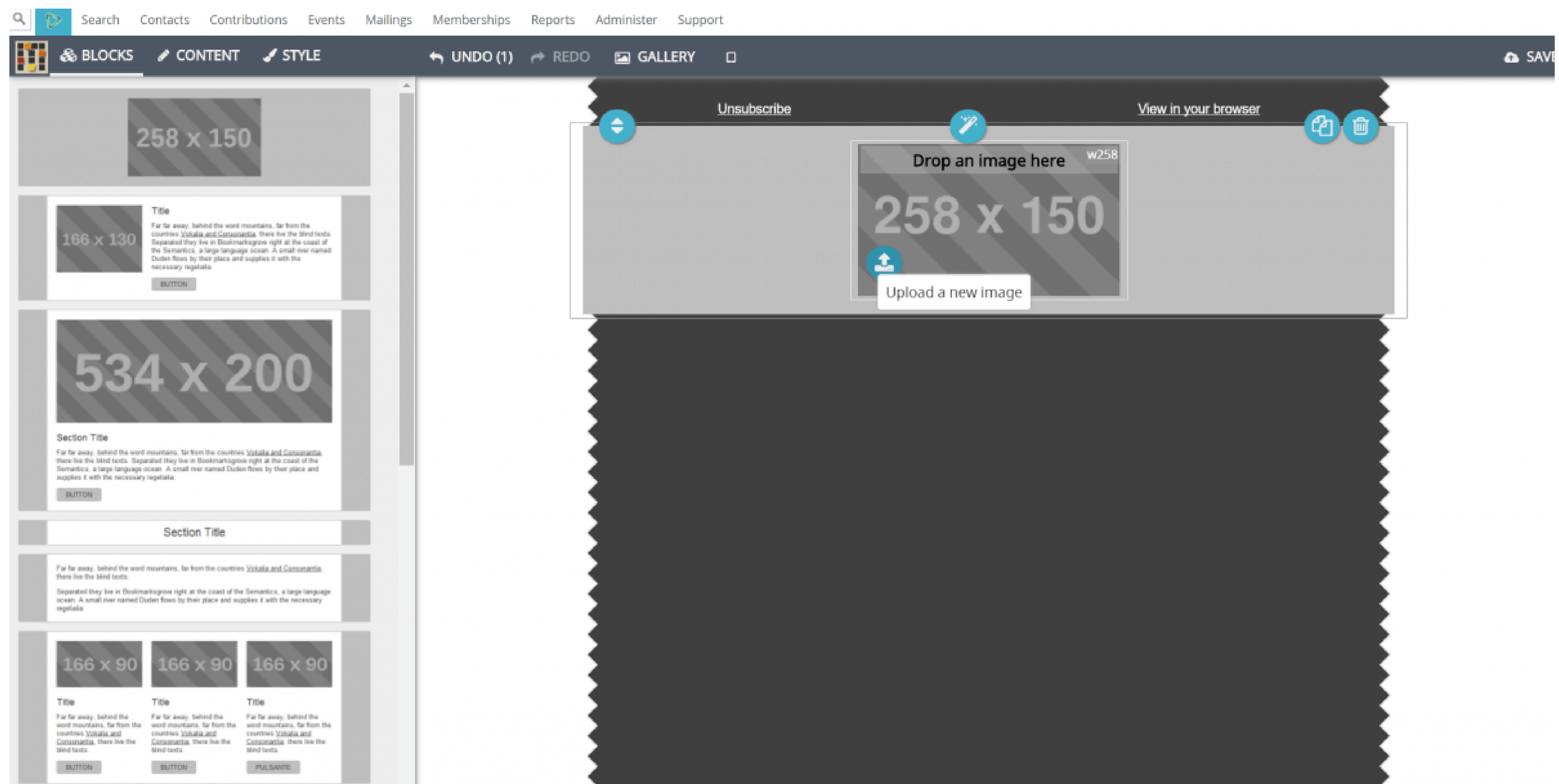

Cost: $5,000

Raiser's Edge Monthly Data Loads

Summary

Too many states have underutilized national LP data. To democratize this data, we need to import this data monthly and in an automated fashion. States will no longer have to deal with Excel spreadsheets in the hands of a few.

Benefits

- Automate the loading of data
- Free up staff time
- Reduce human error
- Update national memberships - importing external memberships is pain therefore a custom application must be developed to carryout this task.
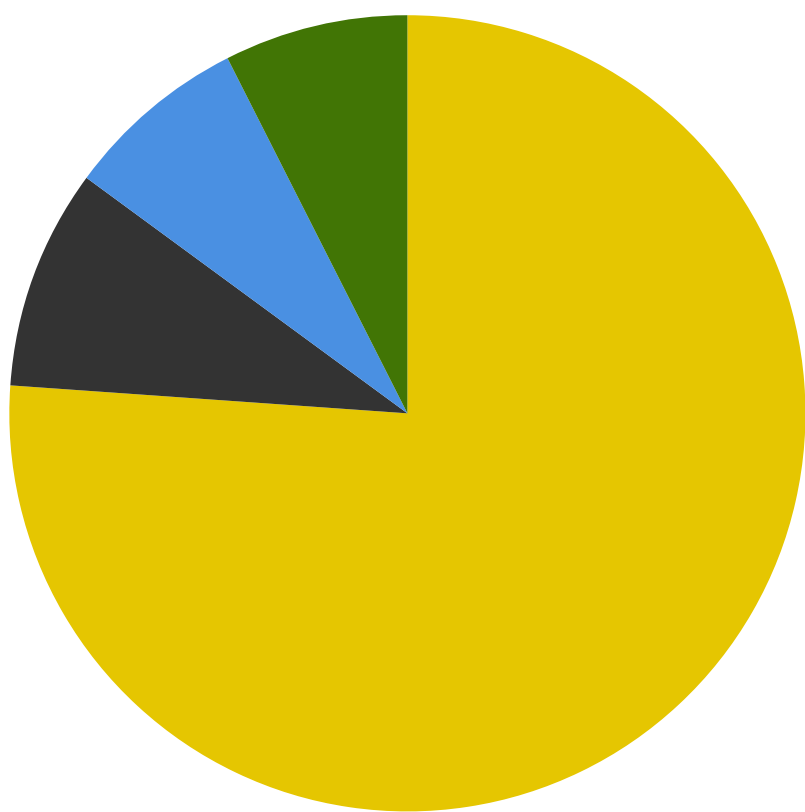
The Raiser's Edge®

CIVICRM®
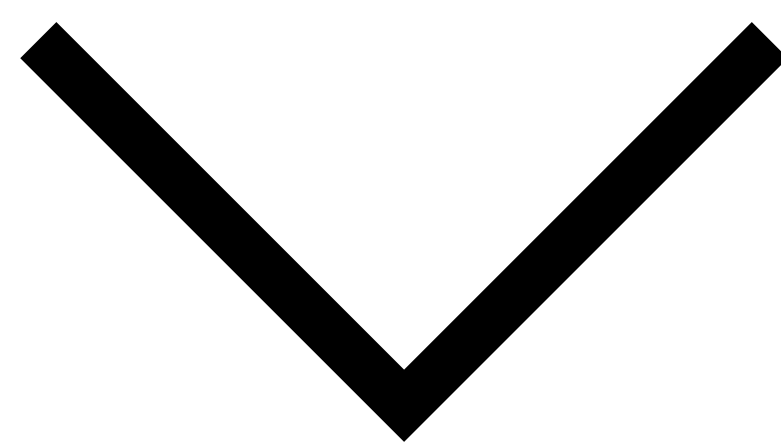
Cost: $4,000-6,000

Conclusion

$67,000 Total Project Cost

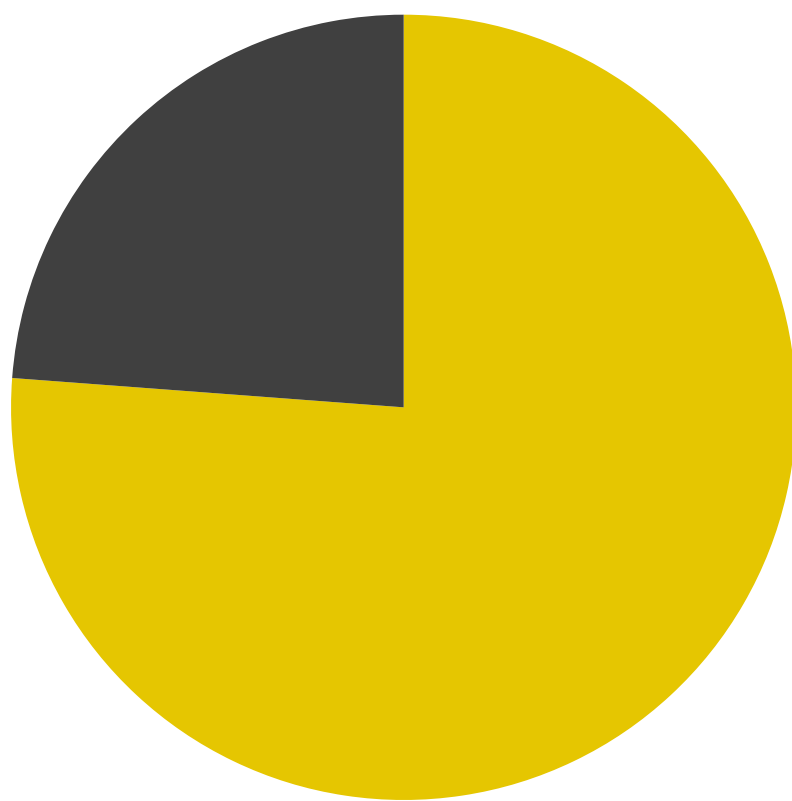## One-Time Development Cost

- 🟨 User Dashboard $51K (76.12%)
- ⬛ RE Monthly Data Loads $6K (8.96%)
- 🟦 POC Phase $5K (7.46%) 🟩 Mass Mailing $5K (7.46%)

Total Cost: $67,000

Max Operating Costs

- 🟨 Managed Hosting $9,600 (76.19%)
- ⬛ Reserve Consultancy $3,000 (23.81%)

With 50 State Subscription. Reserve needed ONLY AFTER one-time development costs are incurred.

To donate, go to LP.org/CRM