

Affiliate Development Specialist Q2 & Q3 2018 Report

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CRM Project

The [State CRM Project](#) is now a year old and we are undergoing our next major development phase; we signed the contract to build the customized User Dashboard on August 21, 2018. In short, this will allow county affiliate access in an intelligent way. If you would like the technical details of how this works, please contact me. The estimated time to completion is 4 – 6 months which puts us at in the February – April 2019 time frame. We are very excited about the way this will empower local volunteers like never before.

The total cost of this was reduced from \$50,000 to \$43,000 by working with CiviCRM to take advantage of current and future upgrades to CiviCRM. CiviCRM ran a [Make-It-happen Campaign \(MIH\)](#) for the [Contact Summary layout Editor](#) (CSLE) which is a dependency for the dashboard. The Libertarian Party also contributed \$1,000 to the CSLE MIH.

Once the dashboard is built, we will work with states to get armies of volunteers making calls to raise state / national membership and build local affiliates.

I am available to do demo's for states at any time.

LP National Affiliate Services (States on each system)

Website	CRM	Email
15	13	10

States Migrating:

- Colorado (December)
- Kentucky (October)
- South Carolina (ready anytime, waiting on them)

States Evaluating:

- Arizona
- Indiana

- Nebraska
- New Hampshire
- North Carolina
- Ohio
- Pennsylvania

My Roles

- Project Management
- Client Support (tickets)
- Training
- Development
- Pre-sales
- Database Administration
- Data Migration

As we move forward, we plan to have experienced state admins train newer state admins as they come onboard. This will lessen the burden on training.

Geocoding

We have setup geocoding so all records can be mapped for when it may be useful. For instance, this is beneficial when states want to see where they have the most support to start a local affiliate. In addition, the system now fills in missing data points including city, county, state, postal code. The most critical data point that usually gets filled in with the geocoder is county; note that all web forms ask for their county via a drop down.

SMS Integration

We have tested this functionality with national and Georgia. We will roll this out sometime in 2019 so states can send mass or individual SMS messages. There are state groups to send to as well as candidate segmentation. One issue regarding phone types will be resolved shortly. That is noted [here](#).

Run For Office Form Integrated with CRM

We now have the [candidate inquiries](#) feeding into the CRM so we can manage their record in one place throughout its lifecycle. Below lists the benefits of doing this:

Benefits

- Store candidate data in one place
- Manage candidate relationship throughout its lifespan (prospect > candidate > election history > elected official)
- Eliminate non-value added data entry and duplication ('virtual paperwork')
- Increase productivity of staff that touch candidate data
- Increase data integrity
- Display candidates in master directory
- Display candidates on state LP sites
- Segment candidates
- Email to those segments
- Track key campaign relationships
- Track specific data relating to candidate campaigns including an overview and results section

Cara Schulz (Candidate Recruitment Specialist) has been using the system and emailing out to these candidates and Political Directors.

Candidate Directories

Because we are feeding candidate submissions into the CRM, we can easily display this data for all states on their sites and a comprehensive national directory for 2019 and onwards. e.g. lpia.org/2018-candidates. States can add/edit their data. This makes managing the data quicker and more efficient, eliminating duplicative actions on both the state and national side.

Campaign Strategy Calls

We have been running Cara Schulz's Campaign Strategy Series conference calls through the CRM. This is beneficial as we build a list of who the dedicated volunteers are. This sends the call-in details to the people who RSVP, and runs a scheduled reminder the day of the event. This saves lots of time so staff can work on higher value-added activities.

Sending Scheduled Reminders For Lapsing State Membership

We also have setup scheduled reminders for lapsing state members. This increases retention and provides a better follow-up call to members so they know about their membership status.

Candidate Websites

We launched a quick initiative to get candidates websites as [outlined here](#). From concept to first site, it was delivered in a few short weeks.

We provided 16 websites in 2018. We could have done more (I would estimate 30-50) by mailing out to those candidates who did not have a site yet (we can filter that in the CRM) but we did not want to take away resources from the CRM Project so this was on a 'as time-allows' basis. Our time is compressed as it is.

We anticipate this service to continue for future elections.

The cost is \$200/mo plus staff time. Myself and Ryan Waterbury (graphic design contractor) build the sites. It takes a combined time of just over an hour. We limited this service to state representative / county offices and lower.

Election History

I took excel spreadsheet data that was from 2002-2016 and compiled it in the CRM. Some data fields show on the [front-end](#).

All years have been imported with the exception of 2006. 2006 formatting was particularly ill-formatted for an excel application so that will be done as time allows.

This process took 3 steps.

1. Creating standards to take in this candidate data
2. Transforming excel sheets to be standardized and properly formatted and appended with data
3. Importing

Number 1 is most important because now going forward, the LP has institutionalized a proper way to manage candidate data that doesn't rely on one person's preferences and fluctuate from election to election, etc. If these standards need adjusting then we will build consensus on changes.

Elected Officials

We have elected officials tracked as well. Here is a part that is still in development in showing them on a [map](#). Just like candidate listings, we can have a central database and show each states elected officials on their site as well as a [national directory](#). Again, this avoids unnecessary duplication.

Recommendation: National should track elected officials and election results in the CRM. This can be done by national staff and state Political Directors whose states use the system. It is only sensible as all candidate data resides in the database. We simply query what data we want to show.

Petition Drive Directory

We did another [beta project](#) that can be used for future petition drives to mobilize volunteers. This included a map of the US with all the petition drives going on at any given time. It includes all the necessary information for each drive:

- Start date
- End date
- Signatures needed
- Petition form
- Point of contact
- Petition schedule
- Paper size
- District map (if applicable)

We also have some tips which enables volunteers to go out and immediately start collecting signatures.

helpdesk.lp.org

We have a dedicated site to streamline how national can help affiliates at helpdesk.lp.org. Affiliates should continue to support requests in [via the form](#).

Q2 and Q3 tickets resolved

Affiliate Support - 160

Graphic Design - 19

Part of the graphic design is candidate websites.

Note: Some tickets are 'project-based' and are much more intensive than others. e.g. migrating data and setting up their IT infrastructure.

Miscellaneous

- Assist LP National with IT needs
- Configured membership form to pre-populate data for fundraising team
- Manage lpstore.org site changes as needed