



LIBERTARIAN

The Party of Principle™

Affiliate Development Specialist 2018 Year-end Report

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Previous 2018 Reports and Synopsis of CRM Project

- [Q2 and Q3](#)
- [Q1](#)

At the December 2017 LNC meeting, I submitted this [report](#). We estimated a budget of \$67,000 to cover the development goals laid out. After a presentation of the results of the initial pilot phase in December 2017, we obtained another \$10k in funding, for hosting and development. We used the development funds to scope the Simplified CiviCRM User Dashboard (User Dashboard). This initiative is to decrease the burden on new volunteers to make phone calls, give proper direction to volunteers and allow live-time access to search their county data to grow their state and local affiliate.

In early January 2018, the State Website project and the State CRM project were merged, providing a seamless integration of websites with CRM and saving the party \$100 per month.

Development of the CRM project was stalled while we waited for LNC approval of the User Dashboard. I focused on getting more states into the system.

At the 2018 NOLA meeting, the User Dashboard was authorized for \$50,000 which allowed us to proceed with that improvement starting in August.

For a synopsis, states are effectively processing and tracking memberships, donations and event registrations. Their donor and supporter data (including registered Libertarians) is imported. We've appended valuable Aristotle data to these records as well.

The data model has been built out extensively covering key aspects for volunteer activity, yard signs, candidate campaigns, media, local affiliates, voter registration, fundraising analytics, volunteer interests, important issues, and relationships within the party.

We have provided directories for candidate and elected official listings for states which roll up to a master national directory. Automation of routine tasks are being created by ways of scheduled reminders and message templates to activate libertarians to volunteer or join. A simplified user guide continues to expand at helpdesk.lp.org/wiki.

2018 CRM Expenses

Total	Hosting	Discovery	Development	Administration
\$27,410.50	\$4,760.00	\$5,054.25	\$16,378.75	\$217.50

We have paid \$15,050 out of the \$43,000 for the User Dashboard. The annual software and managed hosting cost for the Web / CRM platform is a minimum of \$5,824.50. This keeps hosting active and software up-to-date. Contractor support not included.

Reviewing 2018 Goals for State CRM

User Dashboard

The purpose of this sub-project is to allow regular volunteers at the county level to interface and coordinate with other members by simplifying the use of data.

The project was delayed due to funding delays for the discovery phase (\$5,000). The discovery started on April 13th and was completed on May 18th.

We signed the contract to build the Simplified CiviCRM User Dashboard on August 21, 2018. 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 was reduced from \$50,000 to \$44,000 by investing in the [Contact Summary Layout Editor](#) (CSLE) which is now leveraged for the dashboard.

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.

Adding More States

We had 5 states at the end of 2017. We now have 19 states. This is where a lot of my time is spent on-boarding states and prepping their data for import.

There are several states expressing interest at this time. I've put very little focus on selling the system as our HR time does not allow for it. So with that said, the amount of interest is quite encouraging.

Here is a list of states that expressed more than a cursory interest in joining:

- Arizona
- Indiana
- Florida
- Maryland
- Massachusetts
- Nebraska
- New Hampshire
- New Jersey
- North Carolina
- Ohio
- Pennsylvania
- Wisconsin (is migrating)

Raiser's Edge (RE) Automated Loads

This was a planned upgrade, but has not happened due to budget and resource constraints. We continue to import manually from a multisite data dump file for those states on the system quarterly. The User Dashboard development will allow this import to be done in a moderately more efficient fashion. However, this will need to be addressed in the future as it created additional busy-work to import through the default importer.

Mailing Program Optimized

This was planned, but has not yet happened. Our consultants did some initial investigation into this multisite issue in January and did not find a solution that was within budget. States are able to email out of the system, but it takes a small action from National to select the proper recipients (a permissions issue).

A few states are about to use the CiviMail system, while others continue to manually sync to an email service like Mailchimp.

Conclusion

The goal is to leverage economies of scale, and let states spend money on more localized activities that are outreach-centric. We have 19 states on the Web / CRM platform and 15 on email. There are 122,478 individual records in the system. An area that we will emphasize now that we have proper tools for states, is growing county affiliates and fundraising in 2019. Please see the 2019 Affiliate Strategy Plan.

We are reaching a critical mass of what one person can do. We set up a ticket system to help, and we are working to setup a Project and Task management tool for staff and states. But there will be a point where this requires more resources to continue to grow.

Institutionalizing Knowledge

We have continued to build out helpdesk.lp.org to be a affiliate and candidate resource. Particularly, I've worked with Cara Schulz, Candidate Recruitment Specialist, to allow for candidate resources in the [wiki](#). This uploading of material is in progress. This wiki started as a user and IT Director resource for those using the State CRM. We also imported all content from lpaction.org, as this provides password-protection features and a true wiki format.

Campaign Websites

Produced websites for 17 local Libertarian candidates. We started this service late in the going. These contributions stats ran through the system:

Total – \$ 12,151.31 # Completed – 113 Avg – \$ 107.53 Median – \$ 50.00 Mode – \$ 50.00

Notes

All events were attended at contractor's own expense.

- Attended NTEN's (Nonprofit Technology Network) Conference in New Orleans in April 2018. This also included CiviDay.
- Attended Minnesota Council of Non-profits Annual Conference in April 2018.
- Attended CiviCamp and CiviCRM Governance Summit in September.
- I continue to support lp.org and lpstore.org IT requests.