# 2019 Affiliate Development Strategy and Goals

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## 2019 National Affiliate Support Goals (states using services)

A large portion of the resources in 2018 were spent on the back-end of the Web/CRM system and getting states on-boarded. 2019 will be focused on leveraging that data.

We are sending out a survey to states in December that will gather baseline metrics (to append a specific measurable metric to the goals below) on the first 2 points that follow:

### 1. Increase number of active county affiliates

We must focus on the volunteer experience and give proper tools and infrastructure to sustain and deepen volunteer action.

**User dashboard.** Our CRM dashboard will contribute to the empowerment of volunteers by always knowing who is their constituency.

**Improve volunteer signup and engagement process.** We seek to create a streamlined 'how to start and sustain a county affiliate' online guide. These materials exist but we need more 'community' between county chairs to foster growth and competition. Additionally, filtering volunteering signups to the appropriate level and point person (county chair) will help build stronger volunteer relationships.

### 2. Help increase states total funds raised

**Increase Strategic Support.** Moving into 2019, we will turn to how to leverage the CRM to raise money using institutional knowledge of 'what works' from various state affiliates, documented in our wiki.

**Targeted states as 'proof-of-concept'.** We plan to target 5 states on national's IT that are in a good position to take advantage of national's consulting time to demonstrate clear growth in county affiliates and fundraising totals year over year.

We will select these 5 states in January 2019.

## 3. Increase efficiency between national and state IT systems

**All non-donation data run through CiviCRM.** Our recommendation to the LNC is that all *non-donation* data forms be run through CiviCRM (my.lp.org). Today we do this for 'Run For Office' inquiries already, and would like to expand this to the 'Volunteer', 'Info Request', and 'Sign Up' forms. This will make the 'ground level' data available to states immediately. It is a net benefit, as currently data is needing to be exported / imported from a siloed form database to Raiser's Edge *and* CiviCRM. By moving forward with this process improvement, it eliminates one step and increases data immediacy. National's process remains the same.

**Raiser's Edge (RE) specializes as a Donor Database.** We propose that Raiser's Edge becomes purely focused as a donor database, while other constituents that are not donors reside within CiviCRM (registered L's, independents, etc). RE is meant to be used this way; using it to house non-donors becomes cost-prohibitive as the LNC took measures to reduce constituent counts in 2017.

In CiviCRM, we do not have this limitation and a data model has been built out to accommodate this. Additionally, we can leverage our Simplified CiviCRM User Dashboard and 'Call Next' Widget for phone banking to cultivate state and national members as we empower states and counties to grow the relationship with these prospective members and volunteers. This is both cost-effective to other forms of donor cultivation and uses our volunteers time in a wise-fashion.

National can use then use State CRM for donor cultivation once a Service Level Agreement (SLA) is codified in the Policy Manual.

## 4. Set clear lines of delineation on use of data and IT Infrastructure; privacy policy

**State Party Best Practices.** States don't know what they don't know. We want to help states understand how to manage and protect their data.

**National Party Data Sharing.** A huge part of this project is ending the “us versus them” between National and State Affiliates. We need to have a clear understanding of how data is shared between the organizations, codified in the Policy Manual.

## Initiatives to Achieve These Goals

1. **Expand IT services adoption**
    a. From 12 to 20 states on email system by Dec 31, 2019
    b. From 19 to 25 states on Web / CRM by Dec 31, 2019
2. **Continue to expand CRM capabilities to fulfill state needs**
    a. Finish Simplified CiviCRM Dashboard
    b. Improve Wiki documentation and implement CiviTutorial
    c. Use SMS in CiviCRM for targeted states
    d. Re-examine making CiviMail multisite complete (additional funding needed)
3. **Share best-practices with other state affiliates**
    a. Share institutional knowledge to enable success
4. **State CRM Training / Pay-It-Forward campaign**
    a. Superuser states train onboarding state (mentor relationship)
    b. Foster communication between states using the system to help them help each other. (Reduce burden on staff)
5. **Implement Project Management Software**
    a. Use Open Project and OS Ticket which is already in place
    b. Improve collaboration throughout the party

# Asks for LNC

**Affiliate Support budget request: $90,000**

This budget is the most conservative given current LNC financials.

Web / CRM Cost

a. $35,000 for CRM total
    i. Hosting $5,160
    ii. Wordpress plugin and theme updates: $665
    iii. Re-authorize remaining expense of CRM User Dashboard $26,000
    iv. Miscellaneous extra support: $2,000

Unless additional resources are added, we may need to impose a maximum of 5 new states brought into the CRM in 2019. Current funding dictates a balance between adding more states or giving more direct support to existing states.

**Asks for IT Committee**

1. Privacy and usage policy proposal for Policy Manual by January 31, 2019
2. SLA for email and Web / CRM by end of January 31, 2019