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Affiliate Support Review

Strengths

- 29 states on website / CRM network
- Automatic collection of state and national data
- Integration with SOS and L2 data
- National online donations and signup forms all running through the CRM which provides real-time updates to affiliates
- CRM users can segment and target
- Strong value add with national infrastructure
- Affiliates continue to increase engagement with national and its staff
- Regional trainings were a hit and foster better affiliate relations
- Using popular open-source platforms of Wordpress and CiviCRM for maintainability, tailoring to LP and lower long-term operating costs as we scale
- Indiana, Pennsylvania and Georgia are higher performing affiliates on our services that can be "shining star" examples for other states
- Ken Moellman's dedication to affiliate support and CRM

Weaknesses

- Lacking true SLA bounds for affiliate services
- Only ~2 staff members dedicated to affiliate support as their primary role
- Low level of cross-collaboration amongst states
- Lower than expected member-driven funding for affiliate support / CRM for sustainable budgeting (earmarking)
- Up until doing the 2021 affiliate survey recently, we lacked up to date, hard metrics on affiliate support and CRM user satisfaction to track progress
- Up to 1 month delay in synchronization of legacy RE pledgers and offline contributions to CRM
- Still some issues with Level I support (IT Director)
- Still many training issues with end-users
- Affiliates following up with new members and volunteers

Opportunities

- Targeting LPHQ support to high potential states
- Weekly "Affiliate Strategy and Support Hangout" to increase community and collaboration
- Create standardized reports for states including fundraising, recruitment, and membership retention
- National could utilize CRM state donor and supporter data
- National could migrate to the CRM from Raiser's Edge to streamline all data to give a complete view of party interactions with supporters including integration of "actions". Also saves significant amounts of staff time doing manual data entry.
- Search Kit + Form Builder can increase CRM ease of use by providing even more robust dashlets
- CiviMobile app for more user buy-in and ease of use, supporter engagement (push notifications) and in the field use

Threats

- New Hampshire, Delaware, and other "drama" situations eroding national trust
- Potential resource burnout due to increased load on affiliate services and no SLA
- Increased demand from affiliates with fixed national resources. States ask for many things from us without a price tag.
- States low level of responsiveness to CRM onboarding is resource intensive

Q4 Highlights

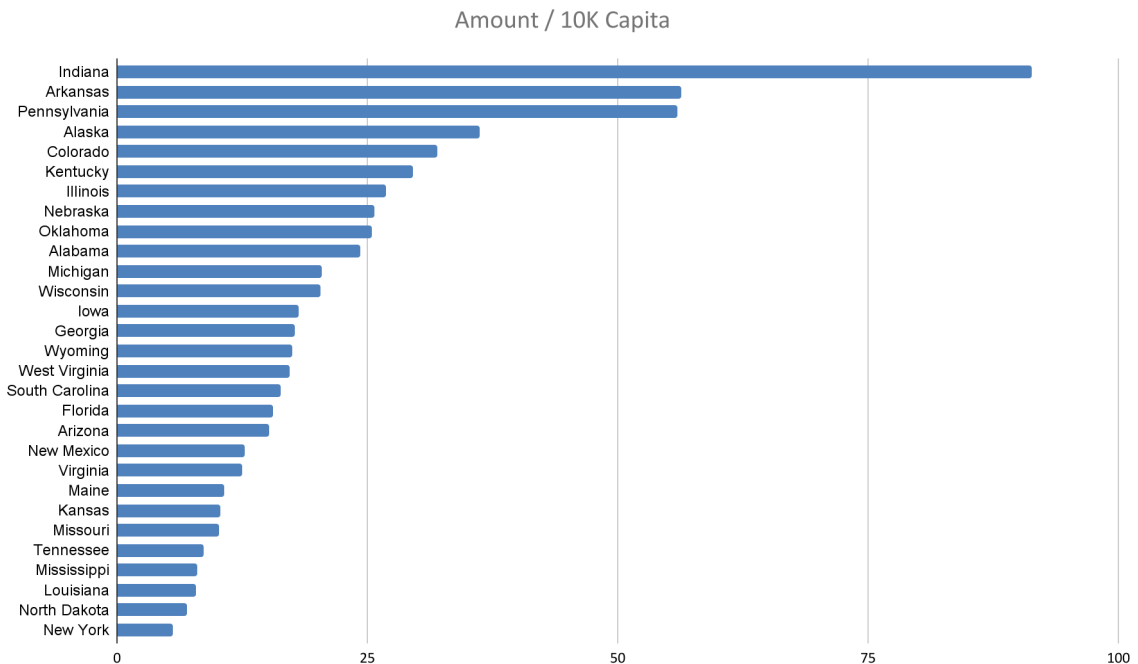
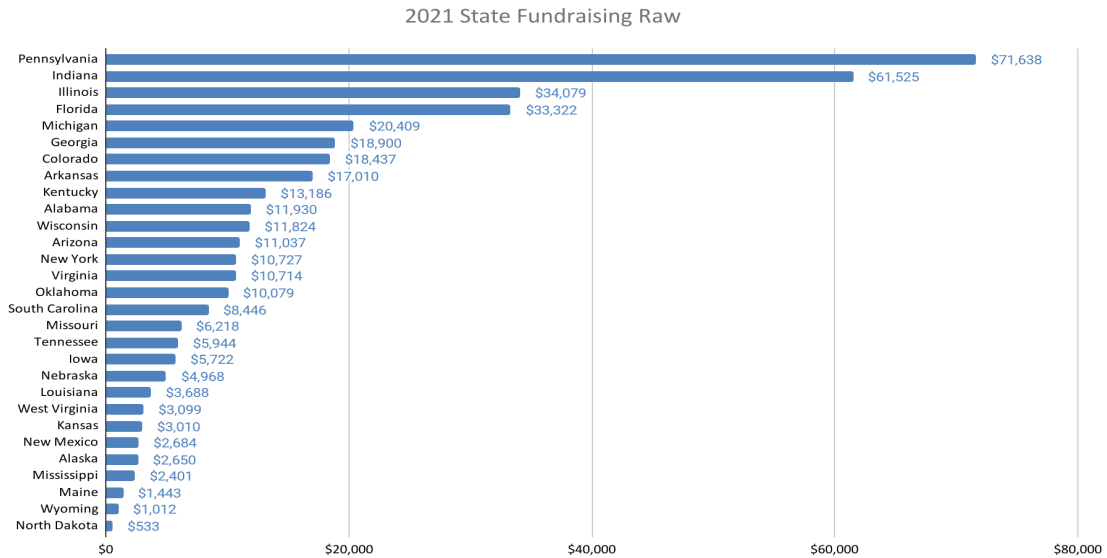
- Setup key reports for LNC 2022
- Meeting with Indiana as a leading state to advance our affiliate services and to highlight a "shining star" state
- Continue to integrate AWS email for states
- Getting CRM ready for national use of email and texting for January 2022
- We have been monitoring the regulation changes around texting. Verified by Campaign Verify and classified as a 527 for larger sending rates and maximum deliverability minimizing the risk of message filtering.
- Efficient SOS data importer in use. Imported SOS data for AZ, KY, NE and OR.
- On December 1st we are turning on the ability for county leader access level and up to view national contributions.

2021 State Affiliate Metrics

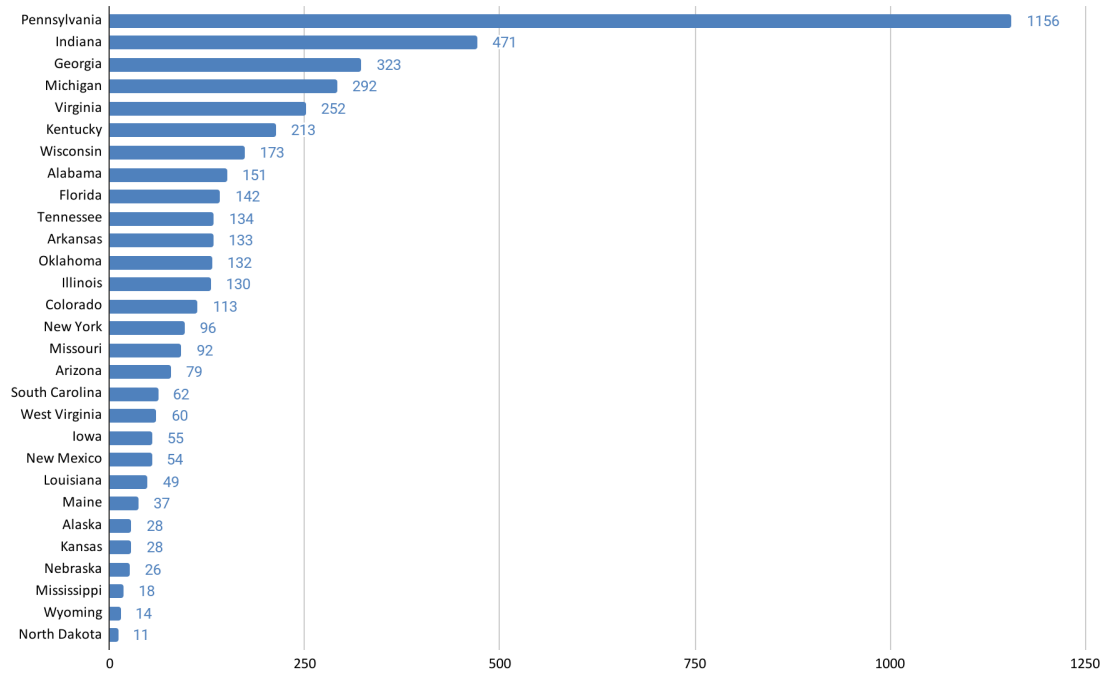
Please note this reporting is limited to CRM states. We have the data readily available to efficiently report without consuming lots of staff time.

Fundraising

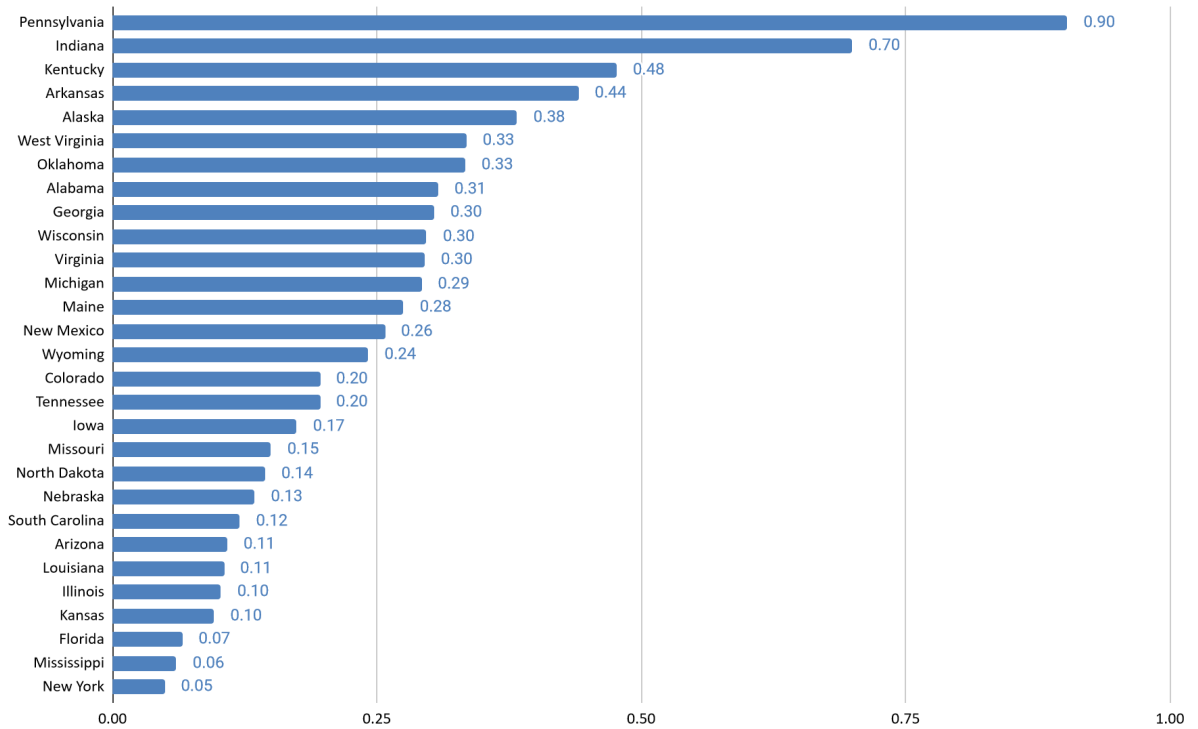
The purpose here is to give an unofficial barometer of how state affiliates are doing in regards to fundraising. Data includes state donations and state member dues only for the period of January 1 - November 21. This excludes events, in-kind donations and merchandise. Please note that there may be discrepancies if a state donor gave to a state they don't live in. If a state has not entered in offline donations, they will not show here.



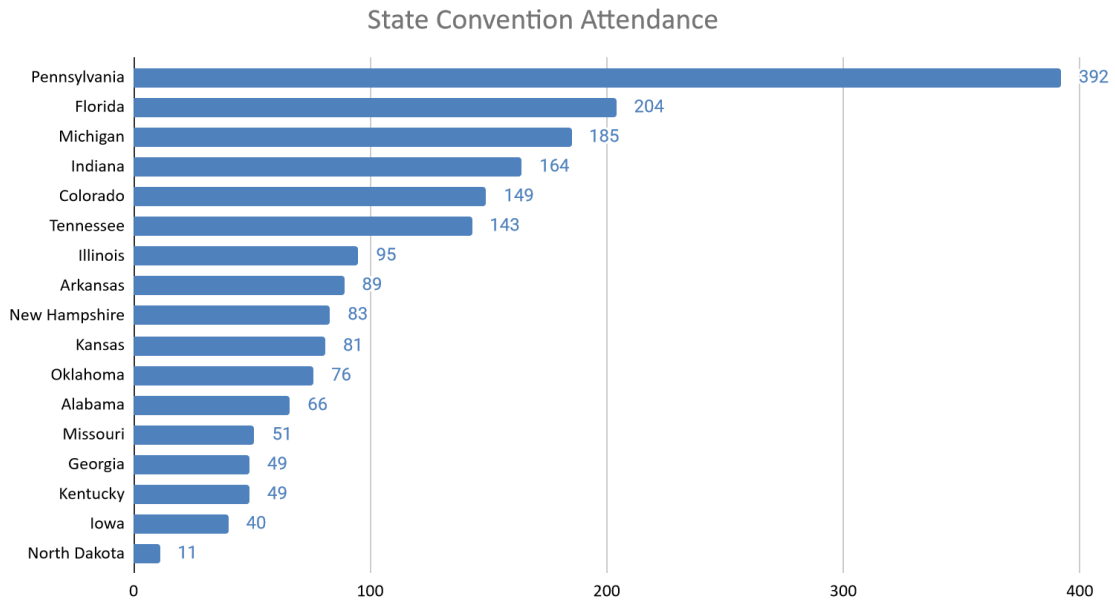
Number of Unique Contributors



Number of Unique Contributors / 10K Capita



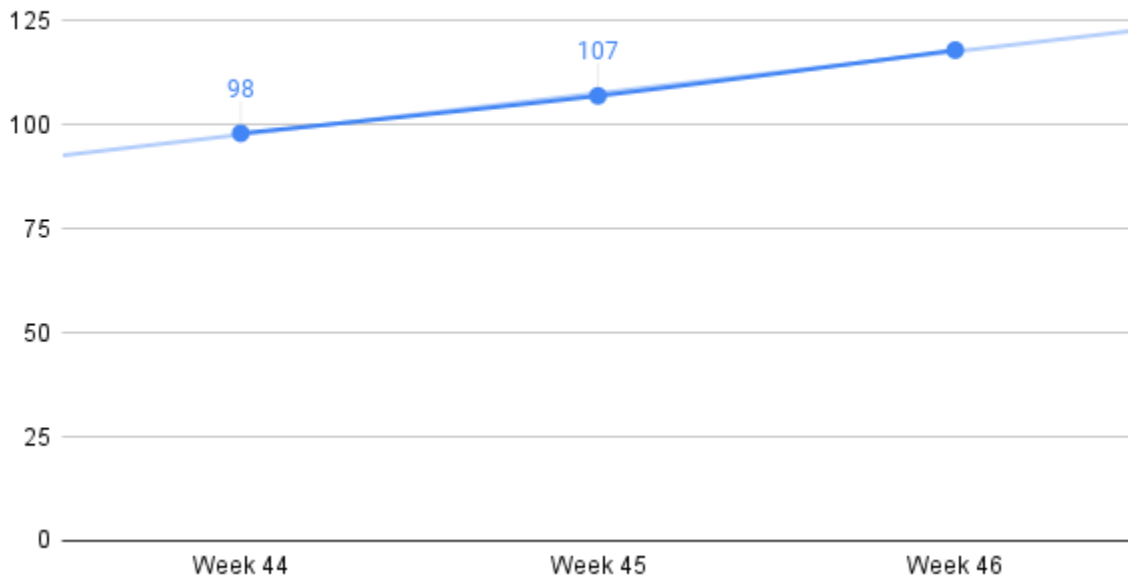
Events



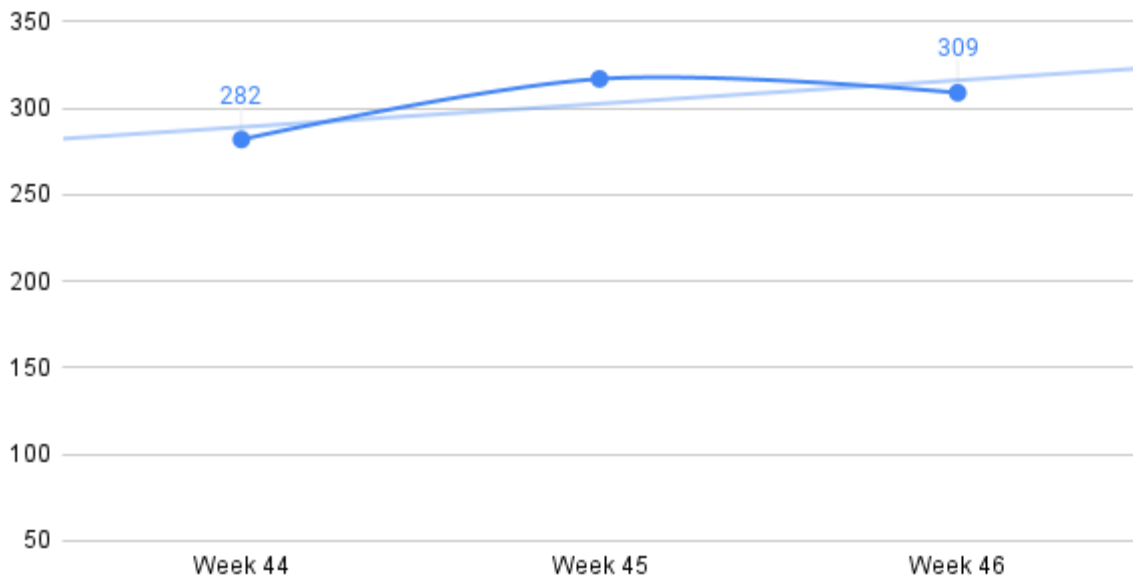
User Login Summary

We were without logging up until the 1st week of November. However, to give some perspective, we were around ~60 weekly users last November so we have nearly doubled our weekly active users (WAU) in a year. 118 WAU for week 46.

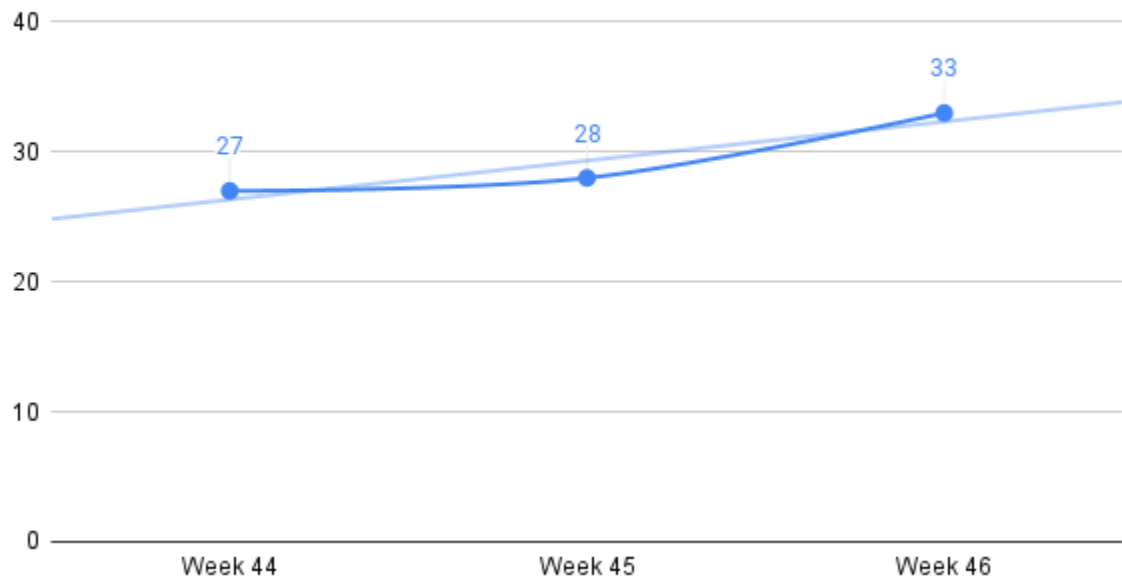
Weekly Active Users (WAU)



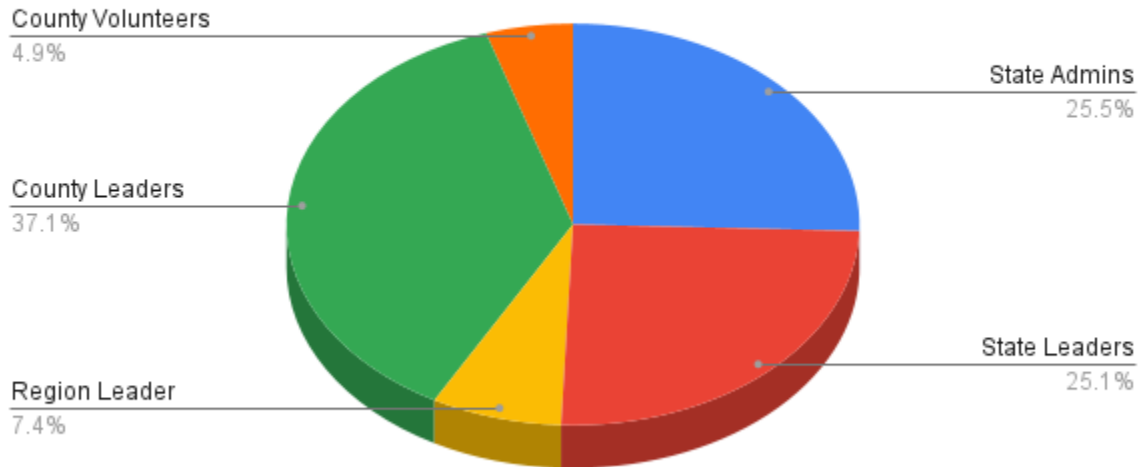
Weekly Login Sessions (WLS)



Sites Utilized



User Base By Access Level

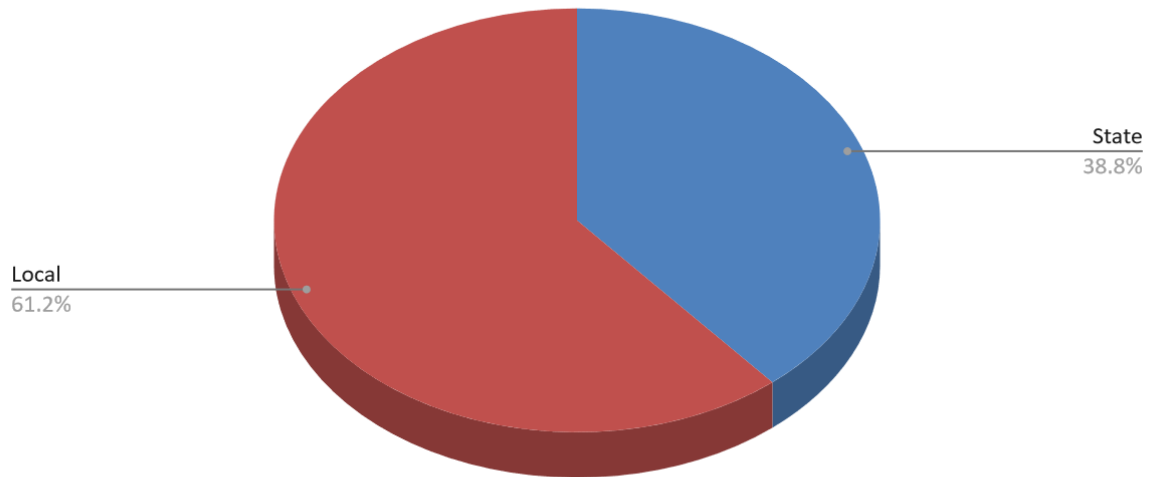


Affiliate Survey

Recently, a survey was sent to state and local affiliate leaders to gauge our successes and weaknesses in respect to the needs and desires of affiliates. Our goal is to prioritize the needs of our affiliates, but the survey also provides insight into other aspects of the party.

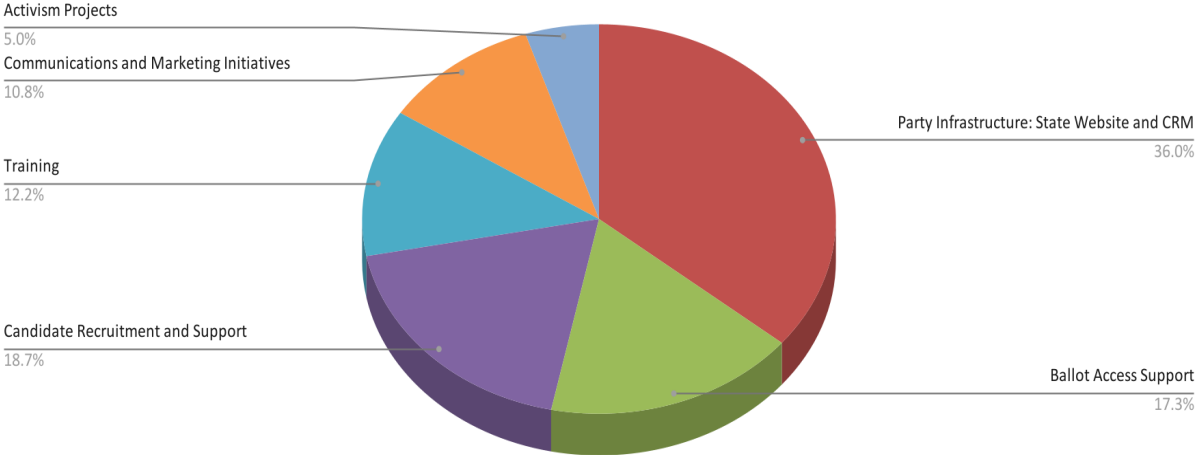
- Total Respondents: 140
- State: 54 (State Chairs: 22)
- Local: 85

Respondents By Affiliate Level

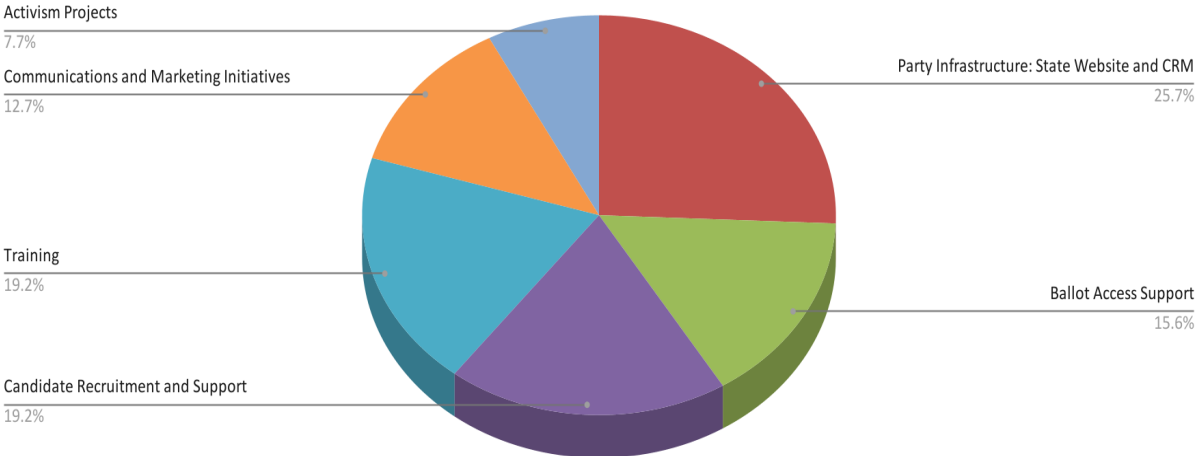


Summary Results

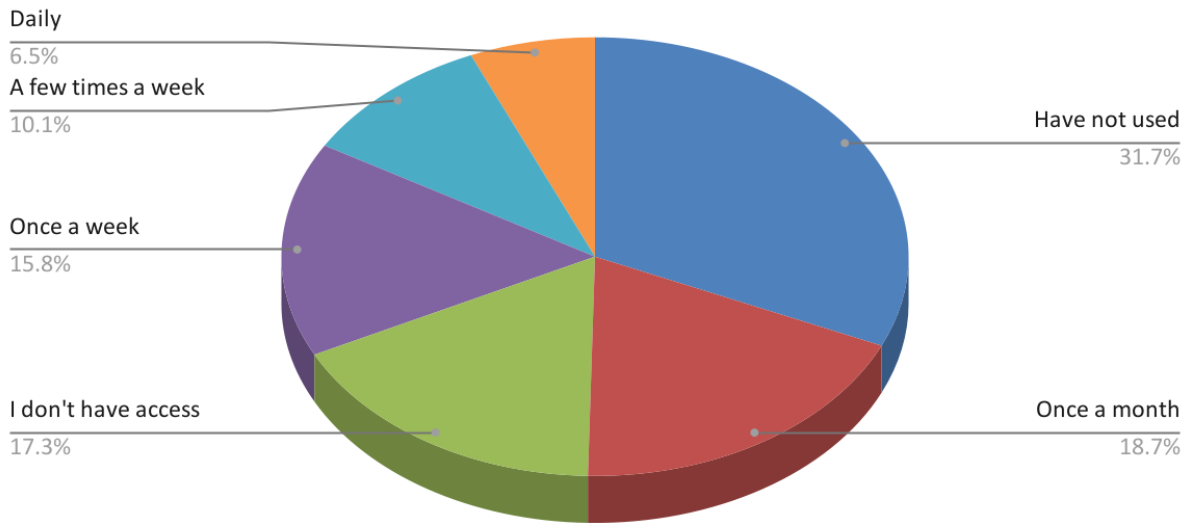
National Services: 1st Choice



National Services: Top 3 Total

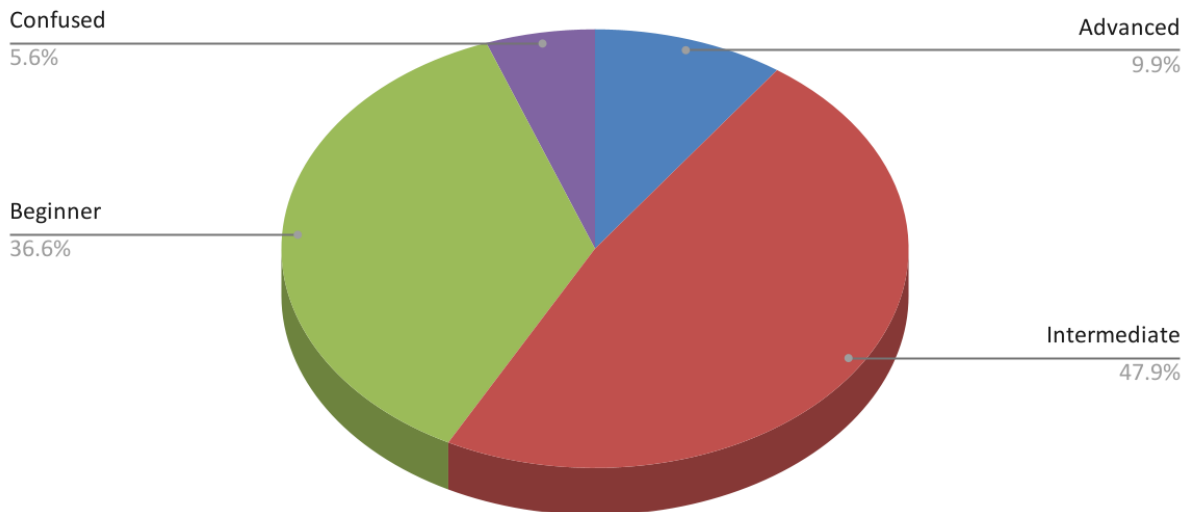


CRM Usage



*The percentage of "have not used" includes states not participating in the CRM project.

CRM Proficiency



Survey Insights

Party Infrastructure remains the top need of affiliates. Still plenty of potential with the CRM as some states are ahead of others. (36%)

This reaffirms the track we are on since the LNC started prioritizing funding of affiliate support in 2015 and then ramped up in 2017 Q4 with the CRM. Investing in this shared tool will yield significant results to growing the party. The more funding we get; the more we can do.

On the flip side we have training and improving the ease of use to work on as 36.6% are still at a beginner level. When a user is at a beginner level, they really are not harnessing the true power to grow the party. One area that would ease of use concerns is state admins developing their reports.

Candidate Recruitment / Support and Training is a top need of affiliates (30.9%)

When combining both the "Candidate Recruitment and Support" with "Training" this totals this category a closer second place at 30.9%. Many people remarked that they loved the regional training and would like to see more of it. In addition, they would like to see a better collection of training videos/courses. Staff currently does some of this with assets on YouTube and in the [Candidate area of our wiki](#) but some information remains scattered and could be promoted better. You can also assume some people selected "party infrastructure..." because of the wiki aspect which in turn gives more credence to providing more "support" and "training" programming.

Local volunteers are lacking direction

Responses to questions showed that there is a disconnect between national and county affiliates. A common theme was that "A lot of people feel lost and alone, and unsure what to do" or operating in a "Wild West" and needing to figure everything out on their own without any guides/structure/templates. We are developing a county affiliate handbook, focusing on building community and strengthening our support model to help in this area.

Users need a better understanding of how to use reports in CRM

This confirmed what we previously knew -- that states vastly under-utilize reports. What is supposed to happen is a State Admin is to build the report such as "National Members", "State Members" or "Recently Lapsed State Members" and then a given user can see those in their dashboard and the contacts are limited to their affiliate area(state, region, county).

However, states are requiring a higher level of direct support to execute this. Therefore in Q4, I created a cheat sheet of over 10 high value reports and how to build them, aka a "paint by numbers" guide. It includes the report template to use, filters and other settings to get the output desired. I've done this for Indiana and Florida as examples, but IT Directors need to execute on this front.

Our group of Level II support will be actively working to shore this up with the states.

County leaders want access to CiviMail

Many county users report they want to send email, which is not a surprise. When we first started out not all states were emailing through the CRM and thus we did not require them to have a paid email provider integrated to account for larger volumes of sending. In some cases, regrettably, some states would not even budget \$20 for Sparkpost to be the provider. The knock-on effect is that we can't allow county leader CiviMail access until every state has a paid account with AWS, our new email provider.

AWS [SES](#) (Email) is pay as you go pricing. It is \$0.10 for every 1,000 emails you send.

- AWS [SNS](#) (Notification) is free for the usage you will have.
- AWS is a widely-used platform with significant support available.
- The AWS plugin has good integration with our system.

Because of the changes, we've already created a timeline to migrate all states to AWS by December 31st, 2021. A notification went out to the states on November 5th. We will be disabling Sparkpost at that time, to avoid and/or resolve a number of issues. This change affects both transactional (e.g. donation receipts) and mass emails.

We are targeting letting county leaders send emails as of January 1st, 2022. We've done a preliminary test and it appears to be workable. We'll need to work through how we handle the county affiliate from addresses but preliminary we are thinking we will import county aliases e.g. marion@lpin.org and the multi-county/regional affiliates we know about. Each state continues to pay for it's usage, including their county affiliate users.

We are also examining the effort required to permit text messaging at the county affiliate level. There are a number of regulatory and industry-imposed rules to navigate, which are currently changing through the end of 2021.

States and counties want a better understanding of email use and template design.

Related to the use of CiviMail, some states are unaware of the professional email template we've enabled for them. While not the latest and greatest of a drag and drop builder, there is a training gap on how to use it and add images, etc. The ideal is moving to the popular drag and drop email template builder called [Mosaico](#). I tested it when it first came out and ran into some multisite compatibility issues. Nevertheless, it may be resolved now and if not we will need to fund to make it multisite compatible. It is one of the top used extensions. [More info.](#)

Notifications to county level instead of only going to state for new members/volunteers

This would be a significant development project to link notifications with the most active local affiliate we have.

LNC feedback

A very common theme in the open-ended questions was dissatisfaction with the LNC. Specifically, the New Hampshire and Delaware situations have seemingly created a distrust of national to some degree in various states. Prior to New Hampshire, 5 states were at various

stages of on-boarding. After New Hampshire, those states paused their migrations and New Hampshire left the CRM system.

Major Initiatives for 2022

Provide Better Guidance for County Affiliates and Increase Volunteer Collaboration

There is currently a low level of cross-collaboration amongst volunteers. There are 2 areas where we can connect volunteers in similar positions to each other and offer support and strategy sessions to bring our LP Community together.

Foster Discussions Groups

We highly encourage collaboration throughout the Libertarian Party to learn from each other. We have set up discussion groups for connecting volunteers in the same or similar positions.

The purpose is to share best practices, recent successes, strategies, and ask for help. We are stronger when we work together! We are looking for 2 super volunteers for each group at the state level and encourage national staff to communicate with their relevant group(s) too. Please connect with me if you are interested.

Email	HQ Staff	State Coordinators
affiliateleaders@lp.org	Michelle MacCutcheon	
statechairs@lp.org	Andy Burns	
treasurers@lp.org	Tim Hagan	
secretaries@lp.org		
membershipdirectors@lp.org	Michelle MacCutcheon	
financedirectors@lp.org	Tara Desisto, Bekah Congdon	
commdirectors@lp.org	Laryssa Gaughen	
fielddev@lp.org	Michelle MacCutcheon	
volunteercoordinators@lp.org	Michelle MacCutcheon	
itdirectors@lp.org	Andy Burns	David Aitken

eventcoordinators@lp.org	Michelle MacCutcheon	
outreachdirectors@lp.org	Michelle MacCutcheon	

Host Affiliate Strategy and Support Hangout

This is planned to be a weekly forum for party leaders to get support and collaborate with one another on any topic. This will help the "local volunteers lacking direction and feel lost" sentiment by building some community.

I want to thank Pat Ford for his *LPTV: Affiliate Spotlight* segment on YouTube in highlighting some affiliates and I encourage affiliate leaders to tune in.

County Affiliate Handbook

A step in the right direction to fixing the "local volunteers lacking direction" expressed in the survey is creating a national "County Affiliate Handbook" (Michelle and I). We collected several from states during the survey and will be taking the best parts out of these to make a national handbook while also plugging useful national resources like the CRM, wiki, etc so they are aware and can take advantage of them. A special thanks to AR, CO, CT, FL and ID for submitting theirs!

States should still have their own as there are local processes and rules that need to be covered, but a national guide will fill gaps, get sent to them immediately via the CRM, and will be a solid toolkit to show what a successful county affiliate looks like.

Raiser's Edge (RE) Gap Analysis and Closing Gap

We have been enabling additional functionality in the CRM, as requested by our affiliates. We have also integrated a number of national party functions, including a consolidation of online donation forms, online ticketing for national events and credentialing for the national convention. We have begun to be more hands-on with state-level fundraising directors to implement charts and reports for them. It is critical that needs are communicated to us so we can attempt to satisfy those needs. This work will always benefit states and counties.

The expanded functionality of the CRM, combined with the additional work involved in maintaining multiple systems, and the increased workload (and associated personnel costs) related to manual data entry in RE, has raised the question of whether to consolidate into CRM.

If the LNC were to adopt a directive to move away from RE by the end of 2022, we are confident that we can replace the remaining functionality of RE in the CRM.

On this front, I've been working with Bekah Congdon to prepare to use the CRM for email marketing and text messaging starting in January 2022. Why? The CRM has all the data from RE plus ~70K plus more emailable recipients and all the data from state and county affiliates.

Affiliate Services SLA

I've developed a draft SLA which started out as a "State Chairs Orientation Guide". The intended audience is any state leader. We automatically send this to new state leaders when they are added to the CRM.

The goal here is to bring state leaders up to speed on how national can help them and also to manage expectations so we deliver on the services we are good at and avoid scope creep. With that said, I often tell fellow staff members that I "go an extra several miles" for states at some points. We try to strike a balance.

Improve CRM User Satisfaction and Training

Weekly CRM User Support

David Aitken will be hosting a weekly *CRM User Support* session on Thursday evening at 8pm ET and once a month Saturday to provide standing options for onboarding users. In conjunction with the automation of a welcome email and guide that is already being provided, this will improve utilization.

Strengthen Our Support Model

Our support system has 3 levels:

- Level III: LPHQ support (Andy and Ken)
- Level II: Advanced IT Directors
- Level I: State IT Director, Secretary
- End Users: Other State Leaders, Region Leaders, County Leaders, County Volunteers

We are also re-working our support model. The Level I support level of the IT Director can be a bottleneck in states preventing users at a lower level from effectively using our system. This is also an issue when people come in and out of the position (transition management).

With this in mind, we strongly encourage states to use their Secretary and if possible find an "Assistant IT Director" as co-equals to the IT Director and form a team. What people, at minimum, should be State Admins to help their user base?

- State Chair
- Vice Chair
- Secretary
- Treasurer
- IT Director
- Assistant IT Director

The second aspect is we are seeking to have a well-trained 5 person team to handle the 29 states we service. Each Level II person will assist 5 states in "leveling up" and do personal

monthly check-ins and phone support. I will oversee 5 states myself. In Q4, I've been trying this out with Indiana with a 1 hour weekly meeting.

An initial focus will be training up Level II in December 2021 in advance of our revamped support model. After that, I'll be in frequent communication with Level II so we know we have a capable, volunteer led support team.

Both of these steps, providing backup capability to the IT Director and filling in Level II support will bring our support to a higher level and take a burden off myself and David Aitken.

CiviMobile App

Currently there are the [CiviMobile](#) and [CiviContact](#) mobile apps. We need to evaluate each first. It requires a "branded version" of the app to make it work for multisite as we are not a typical build case for the app. Likely CiviMobile. This step will:

- Increase user satisfaction and their leveraging of the data
- Ability to do easily do petitions, event notifications, etc

I don't have a quote at this time. We will push to make the existing app multisite capable.

Improve Feedback Mechanism and Metrics on Affiliates

We are planning to track hard metrics and send notifications to the relevant party leader(s) so we foster a "competition-mindset" amongst affiliates. This gives the affiliates wanting to grow proper examples of what a strong affiliate does and looks like. This will be limited to CRM states as we only have that data readily available, it is efficient to do as we can automate this reporting.

Track:

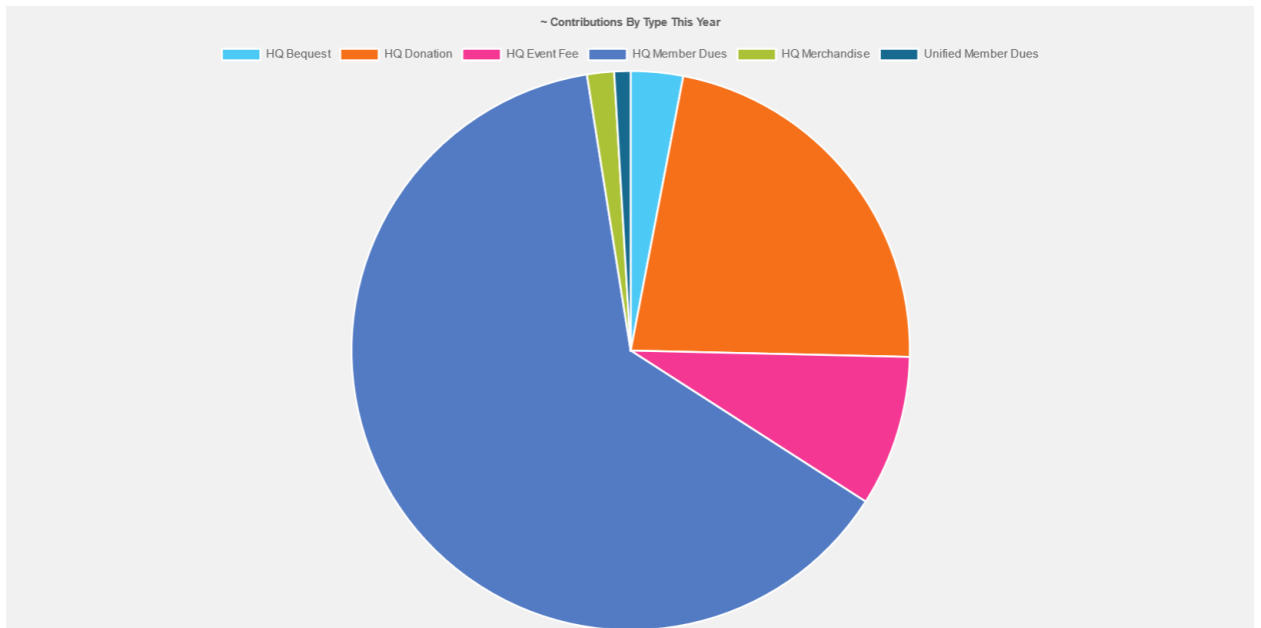
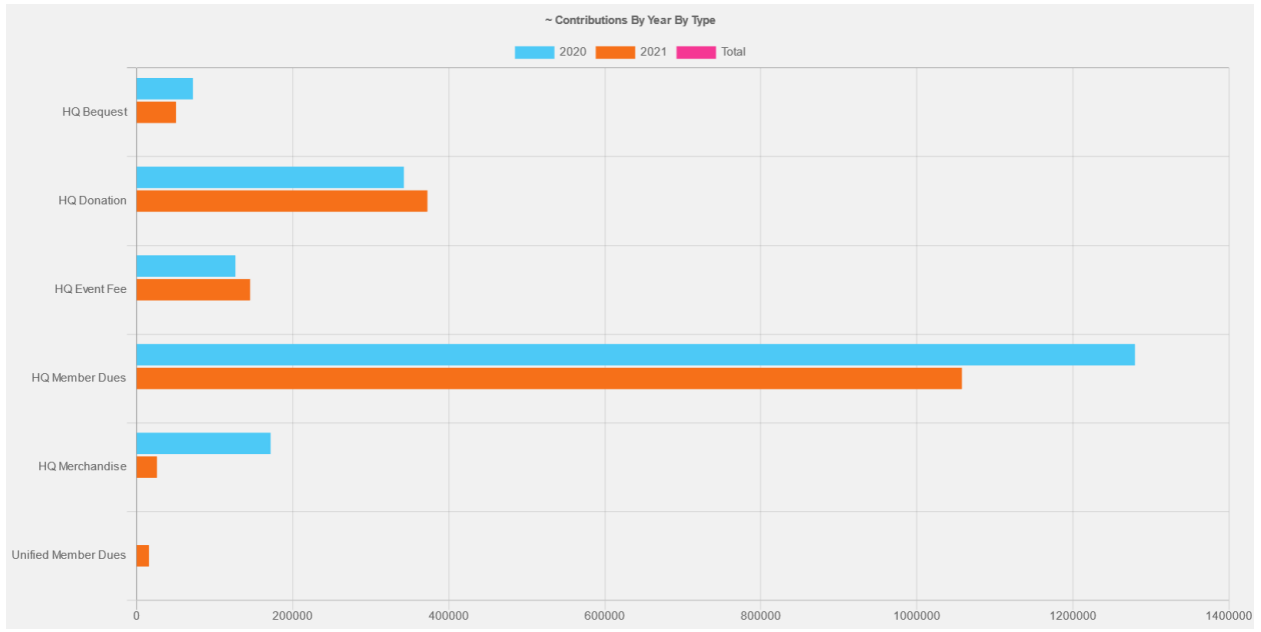
- Contributions (weekly)
- Volunteer inquiries
- Volunteers activity
- State convention attendance
- User Login History: Weekly Average Users (weekly)

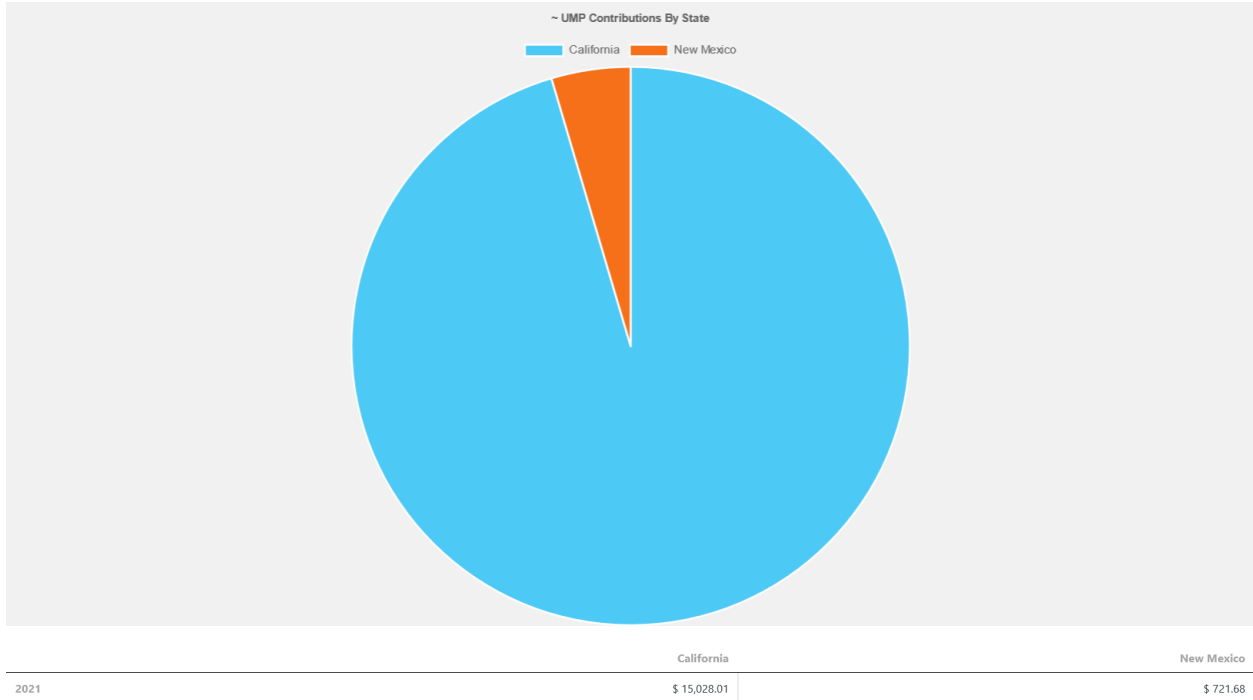
Some National Reports and CRM Stats

- Individual Contacts: 825,520
- Individual E-mailable Contacts: 173,782
- Unique Event Attendees: 2,847
- State Donors Not National Members: 3,261
- State Convention Attendees Not National Members: 1,092
- National Donors who gave Last Year But Not This Year (LYBUNT): 13,982 at a total of \$851,870

- It is a priority to import historical national contributions so we can do comparisons such as fundraising for 2019 v. 2021 in 2022 Q1. We have solidified around 2 solutions to handling the data model of contributions conversion from RE to the CRM.

(Examples of year end reports from CRM)





CRM Budget

The budget below has non-personnel related expenses and is the minimum recommended spend. Increase the CiviCRM improvements line and we'll be able to do more.

Item	Cost	Cost Recurrence	Note
CiviCRM Improvements	\$10,000	OTC	For multisite improvements / general CiviCRM enhancements / give priority to bug fixes we care about / helpdesk
Affiliate Services Data Center Server Hosting	\$5,755	ARC	\$436/mo + padding for "smart hands" assistance
Licenses and Upgrades	\$4,363	ARC	Software licenses, CiviCRM Upgrades, SysAdmin
TOTAL	\$20,118		

*OTC is a one time cost. ARC is an annual recurring cost.

A Final Note

We maintain a longer internal list of priorities based on state feedback and general awareness of national and affiliate needs. As always we encourage affiliates to get in touch with us with your feedback. Some items only take additional staff time while others require additional funding. Based on shared consensus among stakeholders we move forward items with the highest priority, impact and if there is the necessary funding for it. Please consider giving to the [Affiliate Support](#) and [CRM Project](#) funds to help us do more and empower our affiliates.