

## Staff Reports

*Meeting of the Libertarian National Committee, Inc.*

*December 9-10, 2017*

*New Orleans, Louisiana*

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### Executive Director's Report

**Submitted by Wes Benedict**

#### Summary

2016 was an excellent year for the Libertarian Party. The Party excelled in areas including ballot access, presidential election vote results, membership growth, and financial performance.

In 2017, membership has declined from around 20,000 to 15,000 and has since levelled off, as predicted last Spring. However, fundraising has done than originally projected for the year. See separate Financial Report for details.

## Membership

Interest generated by the 2016 Presidential election drove “membership” up to the highest level since 2004. At our April 2017 LNC meeting in Pittsburgh, I explained and wrote in my staff report: “I’m projecting a drop of 4,000 to 5,000 members by August.” That drop has mostly occurred, and membership levels have levelled off at close to 15,000. See separate membership report for full details.

We use several membership retention efforts:

- “Snail mail” renewal letters
- Email renewal notices
- Phoning lapsed members (by staff and LNC volunteers)
- Special offers, like books and T-shirts
- Facebook (regular posts and paid ads)
- Prospecting to the Johnson for President donor list (subject to contract restrictions)
- Prospecting to lists of other organizations
- New memberships from LP.org

## Staff

We’ve added two staff contractors since the August LNC meeting: 1) Cara Schulz—Candidate Recruiting Specialist, to focus on 2018 goal of recruiting 2,000 candidates; 2) Apollo Pazell—Campaigns Advisor, to focus on winning strategic races.

Salaried and hourly staff:

- Wes Benedict—Executive Director
- Robert Kraus—Operations Director
- Eric Dixon—Editor & Technology Developer
- Nick Dunbar—Special Projects
- Matthew Thexton—Member Services

Staff contractors:

- Bob Johnston—Candidate and Affiliate Support Specialist
- Andy Burns—State Affiliate Support Specialist
- Lauren Daugherty—Head of Development
- Elizabeth Brierly—Assistant Editor
- Denise Luckey—Designer
- Jess Mears—Development Manager
- Richard Fields—Press Secretary
- Cara Schulz—Candidate Recruiting Specialist (added)
- Apollo Pazell—Campaigns Advisor (added)

Other contractors used on a regular basis:

- Oliver Hall—Special Counsel

- Paula Edwards—FEC Consultant
- There are more contractors we use on a semi-regular basis that are not detailed here for things such as cleaning services, HVAC repair, general maintenance, tech support, legal help, ballot access petitioning, several part-time callers for membership renewals, LP News writers and proofreaders, and other things.

Former staff and contractors:

- No new reductions to report.

Upcoming Staff Plans

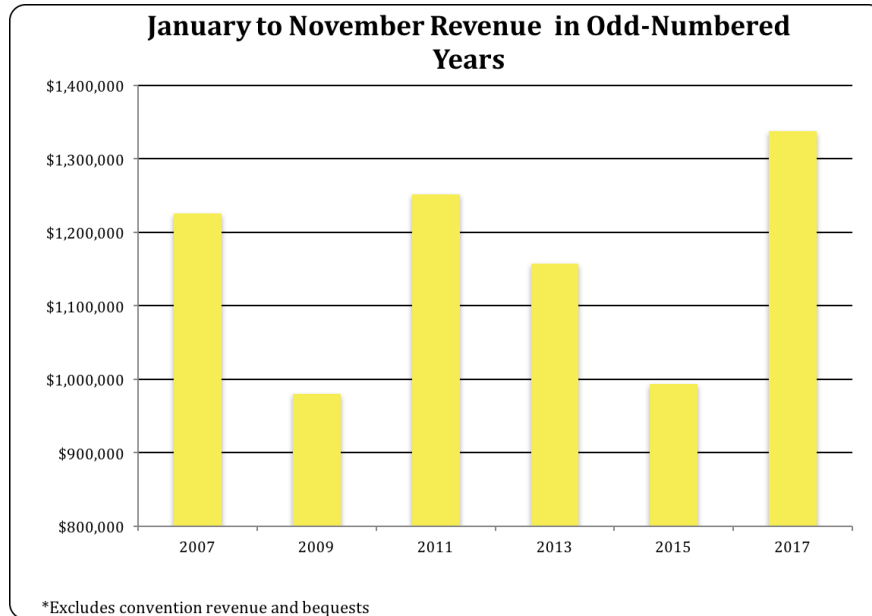
- No additions planned in the short term. We considered adding a membership coordinator, but that plan is on hold due to cost considerations and the ability to find an effective person.

**Costs, Dates, and Revenue from Direct Mail Projects 2008 through 2017**  
**2017 Appeals as 2017-11-30**

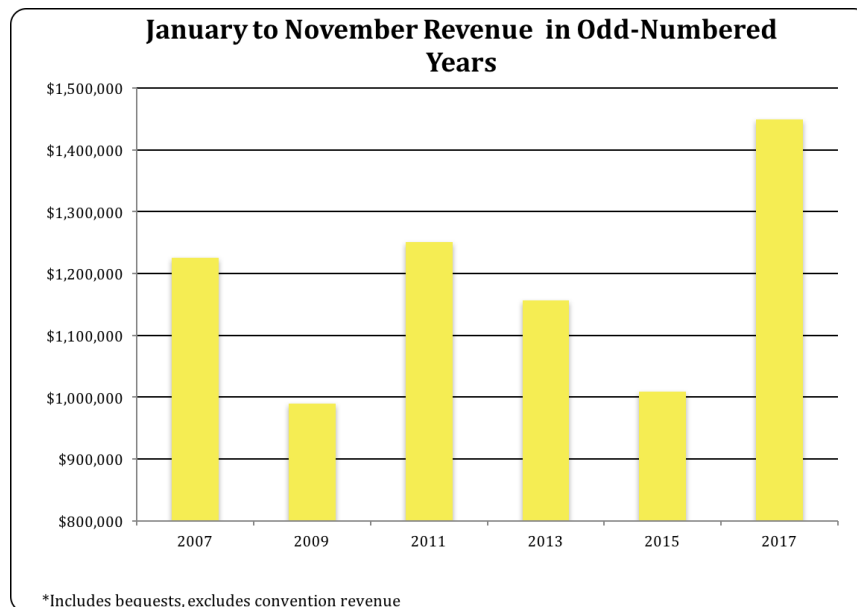
Official Mailing ID	Drop Date	Title	# of Pieces Mailed	Target Population	Gross Revenue	Total Costs	Net Revenue	No of Donors	Percent Response	Average Gift Amount	Cost to Raise \$1.	ROI	Cost per Donor
<b>House</b>													
1701 HO	1/23/17	Guns and Marijuana	24,992	recent contributors	\$11,784.00	\$8,546.00	\$3,238.00	164	0.66%	\$71.85	\$0.73	\$1.38	\$52.11
1702 AR	3/2/17	Annual report	11,367	\$65+ recent contributors	\$10,396.00	\$19,343.00	-\$8,947.00	111	0.98%	\$93.66	\$1.86	\$0.54	\$174.26
1702 AR HD	3/2/17	Annual report Deluxe	274	High Donors	\$100.00	\$746.00	-\$646.00	1	0.36%	\$100.00	\$7.46	\$0.13	\$746.00
1704 BA	4/4/2017	Ballot Access	5000	previous BA contributors	\$14,861.00	\$7,834.00	\$7,027.00	116	2.32%	\$90.48	\$0.66	\$1.52	\$59.34
1705 HO	5/31/17	Hire Ltr	19,984	recent contributors	\$10,496.00	\$6,884.00	\$3,612.00	140	0.70%	\$25.86	\$0.80	\$1.26	\$20.60
1705 HO HD	5/7/17		779	High Donors	\$7,360.00	\$319.00	\$7,041.00	8	1.03%	\$1,789.88	\$0.79	\$1.26	\$1,416.00
1706 HO HD	7/16/17	timeless mission	780	High Donors	\$3,620.00	\$2,884.00	\$736.00	8	1.03%	\$1,789.88	\$0.79	\$1.26	\$1,416.00
1708 HO	8/17/17	Tipping Point	35,006	contributors and inquirers	\$14,319.00	\$11,328.00	\$2,991.00	15	0.04%	\$409.33	\$0.08	\$11.97	\$34.20
1709 HO HD	9/15/17		220	High Donors	\$ 6,140.00	\$513.00	\$5,627.00	195	88.64%	#REF!	#REF!	#REF!	#REF!
<b>Subtotal House</b>			<b>98,402</b>		<b>\$79,076.00</b>	<b>\$58,397.00</b>	<b>\$20,679.00</b>	<b>758</b>	<b>0.77%</b>	<b>\$104.32</b>	<b>\$0.74</b>	<b>\$1.35</b>	<b>\$77.04</b>
1702 LP News	2/6/17	Building fund match	21,014	subscribers	\$7,298.00		\$7,298.00	87	0.41%	\$83.89			
1704 LP News	3/29/17	Momentum	20,961	subscribers	\$2,802.00		\$2,802.00	49	0.23%	\$57.18			
1706 LP News	6/1/17	Become a Pledger	18,703	subscribers	\$3,778.00		\$3,778.00	29	0.16%	\$130.28			
1709 LP News	9/12/17	Ballot Access	15,974	subscribers	\$6,538.00		\$6,538.00	88	0.55%	\$74.30			
<b>Subtotal House Appeals Incl. LP News</b>					<b>\$86,374.00</b>	<b>\$58,397.00</b>	<b>\$27,977.00</b>	<b>\$845.00</b>	<b>#DIV/0!</b>	<b>\$102.22</b>	<b>\$0.68</b>	<b>\$1.48</b>	<b>\$69.11</b>
<b>Renewals</b>													
1701 RE	1/30/17	wes upgrade appeal	3,862	6 month Expires	\$12,170.00	\$1,414.00	\$10,756.00	211	5.46%	\$57.68	\$0.12	\$8.61	\$6.70
1702 RE	3/8/17	wes upgrade appeal	4,215	6 month Expires	\$12,973.00	\$1,469.00	\$11,504.00	206	4.89%	\$62.98	\$0.11	\$8.83	\$7.13
1703 RE	3/31/17	wes upgrade appeal	5,837	6 month Expires	\$11,915.00	\$1,730.00	\$10,185.00	204	3.49%	\$58.41	\$0.15	\$6.89	\$8.48
1704 RE	4/30/17	wes upgrade appeal	7,113	6 month Expires	\$13,235.00	\$2,062.00	\$11,173.00	195	2.74%	\$67.87	\$0.16	\$6.42	\$10.57
1705 RE	5/26/17	Blockbuster year	8,068	6 month Expires	\$3,872.00	\$2,651.00	\$1,221.00	105	1.30%	\$36.88	\$0.68	\$1.46	\$25.25
1706 RE	7/7/17	free lapel pin	9,130	6 month Expires	\$11,000.00	\$4,911.00	\$6,089.00	225	2.46%	\$48.89	\$0.45	\$2.24	\$21.83
1707 RE	7/21/17	wes upgrade appeal	8,847	6 month Expires	\$13,170.00	\$2,645.00	\$10,525.00	238	2.69%	\$55.34	\$0.20	\$4.98	\$11.11
1708 RE	9/5/17	wes upgrade appeal	8,911	6 month Expires	\$18,460.00	\$2,308.00	\$16,152.00	281	3.15%	\$65.69	\$0.13	\$8.00	\$8.21
1709 RE	10/5/17	wes upgrade appeal	7,636	6 month Expires	\$5,705.00		\$5,705.00	94	1.23%	\$60.69	\$0.00	#DIV/0!	\$0.00
1710 RE	11/2/17	Blockbuster year - free gift	7,321	6 month Expires	\$3,462.00	\$3,002.00	\$460.00	71	0.97%	\$42.28	\$0.87	\$1.15	\$42.28
<b>Subtotal Renewals</b>			<b>70,940</b>		<b>\$105,962.00</b>	<b>\$22,192.00</b>	<b>\$83,770.00</b>	<b>1830</b>	<b>2.58%</b>	<b>\$57.90</b>	<b>\$0.21</b>	<b>\$4.77</b>	<b>\$12.13</b>
<b>Lapsed</b>													
1703 LA		Nick S renewals			\$20,155.00		\$20,155.00	365	#DIV/0!	\$55.22	\$0.00	#DIV/0!	\$0.00
1705 LA (1S)	5/26/17	Blockbuster year - t-shirt	21,930		\$4,700.00	\$7,675.00	-\$2,975.00	132	0.60%	\$35.61	\$1.63	\$0.61	\$58.14
1710 LA	11/2/17	Blockbuster year - free gift	11,886		\$1,500.00	\$4,874.00	-\$3,374.00	46	0.39%	\$32.61	\$3.25	\$0.31	\$105.96
<b>Subtotal Lapsed</b>			<b>33,816</b>		<b>\$26,355.00</b>	<b>\$12,549.00</b>	<b>\$13,806.00</b>	<b>543</b>	<b>1.61%</b>	<b>\$48.54</b>	<b>\$0.48</b>	<b>\$2.10</b>	<b>\$23.11</b>
<b>Prospecting</b>													
1702 PRW	2/21/17	please join	20,012	GJ list	\$1,150.00	\$6,024.00	-\$4,874.00	36	0.18%	\$31.94	\$5.24	\$0.19	\$167.33
1702 PRL	2/16/17	join get shirt	19,832	GJ list	\$3,482.00	\$8,369.00	-\$4,887.00	92	0.46%	\$37.85	\$2.40	\$0.42	\$90.97
1705 PR 1s	5/31/17	free t shirt	16,984	GJ list	\$1,496.00	\$6,922.00	-\$5,426.00	52	0.31%	\$28.77	\$4.63	\$0.22	\$133.12
1705 PR 2s	5/11/17	choose a shirt	50,001	GJ list	\$6,495.00	\$16,107.00	-\$9,612.00	202	0.40%	\$32.15	\$2.48	\$0.40	\$79.74
<b>Subtotal Prospecting</b>			<b>106,829</b>		<b>\$12,623.00</b>	<b>\$37,422.00</b>	<b>-\$24,799.00</b>	<b>382</b>	<b>0.36%</b>	<b>\$33.04</b>	<b>\$2.96</b>	<b>\$0.34</b>	<b>\$97.96</b>
<b>Web &amp; White mail</b>													
Web Contributions		Donations			\$19,404.00		\$19,404.00	326		\$59.52			
Web New Members		New Members			\$115,834.00		\$115,834.00	2,273		\$50.96			
Web Renewals		Renewal Memberships			\$135,982.00		\$135,982.00	2,405		\$56.54			
White Mail Contributions		Donations			\$7,775.00		\$7,775.00	76		\$102.30			
White Mail for Membership		Membership			\$9,264.00		\$9,264.00	118		\$78.51			
<b>Subtotal for Web and White Mail</b>					<b>\$288,259.00</b>		<b>\$288,259.00</b>	<b>5,198</b>		<b>\$55.46</b>			
<b>SPECIAL PROJECTS</b>													
<b>2017 GRAND TOTAL</b>					<b>\$519,573.00</b>	<b>\$130,560.00</b>	<b>\$389,013.00</b>	<b>8,798</b>		<b>\$59.06</b>			

Lauren Daugherty, Head of Development  
December 2017

The year is not yet complete but we now have 11 months of data that show strong fundraising for 2017. Comparing 2017 with other odd-numbered years, 2017 exceeds all of the past 5 and exceeds the average of those 5 by 19%. This excludes bequest and convention revenue.



When the Clinard bequest is included, and other bequests are included in the years in which they were initially received, 2017 again exceeds the past 5 odd-numbered years and exceeds the average of those 5 by 28%.



With regard to convention revenues, we are far ahead of where we were 2 years ago. On December 1, 2015, we had raised \$44,000 for the 2016 national convention. As of December 1, 2017, we had raised \$80,931 for the 2018 national convention. That is an increase of 83%. We are 7 months out from the convention and we've already funded half of the 2018 convention, which is expected to cost \$157,000. It is also worth noting that this is not a presidential election year and we were expecting a lower turn out for this convention than the 2016 convention, yet the data so far indicates that 2018 may far exceed those expectations. Hotel room sales have also been very high, requiring multiple extensions of the agreement between the hotel and the party.

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Our membership dip has plateaued and membership numbers began to increase in November. I credit this to two things: 1) Those who joined during the height of the 2016 election but didn't feel a lasting attachment to the party have now mostly lapsed. 2) We've been successful in recruiting new members via social media and encouraging renewals with membership promotions.

Over the last few months, we've been offering gifts for new and renewing members when they join/renew via custom links online. We have offered this promotion via email and through social media, using both paid ads and unsponsored posts. These campaigns have been very productive.

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Every organization, whether it is a non-profit, a political party, or traditional business will have some customers/members that don't return. There are usually a series of reasons for this. Here are my thoughts on the factors impacting our membership retention, based on my observations this past year and feedback from members/donors:

- 1) Some members/donors joined just for 2016. They didn't like Clinton or Trump and wanted to support another option, so they gave to us without any intention of sticking around because they don't really consider themselves to be Libertarians.
- 2) Some members/donors joined in 2016 and then were unhappy with Johnson's performance as a candidate and have decided not to support the LP further at this time because of that.
- 3) Some members/donors are unhappy with actions or words of LNC members and have chosen to stop giving because of that.
- 4) Some members/donors are unhappy that at some point they did not get the outreach, appreciation, or communication that they wanted from us so they have decided to stop giving because of that.

All of these are valid, respectable reasons. Our development team can't do anything about factors 1, 2, or 3 but we are working to make sure that we do the best job we can on factor 4.

Towards that end, over the past year, our development team has worked on providing better communication with members and donors by being highly responsive to emails that come in through info@LP.org, providing good-quality customer service, upgrading our thank you notes and systems, and more. We also initiated and ran the series of conference calls which have been very popular.

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Here are the goals I have set for our fundraising for 2018:

- Annual revenue of \$1,750,000 and a stretch goal of \$2,000,000.
- Focus on high dollar cultivation as much as possible, and prioritize in-person meetings.
- Prune off other tasks, when possible, that aren't directly related to fundraising so that development staff can focus and have the biggest impact possible on fundraising.
- Host 6 fundraising events over the course of the year.
- Produce 4-6 housefile letters and 4-6 high-dollar letters with more specific asks, based on a donor's past giving history and level.
- Fund the 2018 national convention before the convention happens, through promotion of tickets and sponsorships via email and a limited high-dollar mailing.
- Raise \$100,000 at the gala at the national convention.
- Continue to polish and improve donation pages and materials for consistency, branding, and best performance.
- Use Facebook and other online ads for prospecting that is efficient in terms of both time and money.
- Grow membership 10% over the course of the year.

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Some people try to compare the Libertarian Party to other non-profits. Often, this is an unfair comparison because the parameters in which we operate are so different. With regards to fundraising, here are some key differences:

- Most non-profits do not have legal caps on how much a donor is allowed to give at any time.
- Most non-profits are not legally prohibited from taking donations from government contractors.
- Most non-profits can receive donations/grants from 501(c)(3)s and other similar organizations.

- Most non-profits have the benefit that their donors can write-off donations on their taxes.
- Most non-profits are not required to give their donor list to the government for public display.
- Most non-profits have a full-time CEO/chair/president that spends a large portion of their time on fundraising.

Aside from suing the government in an attempt to change some laws, we can't do anything about those first five. But, the Libertarian Party could decide to pay our chair so that he/she can work full-time and devote a significant portion of that time to fundraising.

I think that if we want the LP to thrive as an organization, and greatly increase our fundraising to the level needed to thrive, we need to make this change and have a full-time, paid chair.

Nick has been very generous with his time, but it is limited. Periodically, I ask him to call certain donors. When he calls donors, he is very successful. He occasionally attends major events such as FreedomFest on behalf of the LP and using those opportunities to interact with donors. When he does this, he is very successful.

Folks who have the capacity to give very large checks want to talk with the person in charge. The rest of us can be helpful in securing those larger donations but we can never replace the value the chair brings when talking with these donors. The chair is essential to high dollar cultivation on the scale to which we aspire.

My understanding is that such an organizational change would require amending the bylaws and so it is a decision that would be made by the delegates at a national convention. However, I encourage the LNC, as leaders of this party, to carefully consider this recommendation and whether they want to encourage delegates to consider such a change.



## Campaigns Advisor Report (Apollo Pazell)

### Goals:

The goal of this position is to provide support to candidates generally in ways that are appropriate and in compliance with regulations. For the most part, the general support that I have provided and fielded has been related to connecting candidates with vendors for printing, online tools, polling, etc. Some candidates have asked specifically for help creating a messaging strategy or a social media campaign to drive likes.

More specifically, the campaign advisor position is working on identifying winnable districts throughout the country, narrowing the results to a targeted few, recruiting or supporting candidates in those races, and helping them build a campaign structure that will produce noted results. The effort on this project is narrow in scope, creating a best practice for third party candidates so it can be tweaked, emulated, and mass produced in the future.

For this project, we are focusing primarily on state legislative races rather than state wide, non-partisan, or executive races. The purpose of this focus is the ROI potential that comes from smaller districts with more access to regional media. State legislative seats are more attainable for a third party than a statewide race with limited resources. Non-partisan races, though important for grooming a bench of candidates, does little to promote the brand of the party, or convey a winning trajectory. Local races, even executives, like city council or mayor, along with mostly being non-partisan, also do not have the built in media connection that comes with the proximity to state governance.

### Progress:

In the two weeks that we have been active, we have identified 84 races that meet a specific criteria for winnability. Of those 84 races, we have narrowed it down to 40 preferred districts and have begun an extensive recruitment project. So far 14 POTENTIAL candidates have begun the process of recruitment, as we evaluate their message, background, and strengths(weaknesses).

Simultaneously we are connecting candidates with vendors, staffers, and activists that will produce results that can be replicated. The targeting process is fluid, as of right now, we targeting districts rather than candidates. If the candidate running in a particular district does not have the strengths required to achieve a win, that district will not be a targeted race. On the reverse, and far more rare, targeted races can be based on political landscape (scandal, vacancy, etc) or particular viability of a candidate.

We are working closely with the state leadership, to recruit these candidates, and deferring to each state's executive committee in this coordinated effort, instead guiding from behind as a resource and coordinator rather than a mandate. In the process, stimulating a healthy recruitment program that continue after this project has concluded. Ideally, in the future, state party leadership will effectively recruit candidates without the influence of the Campaign Support office and targeted races can be identified from a pool of candidates rather than starting from scratch.

Many of the states that contain a targeted race have deadlines for candidate filing within weeks or months for 2018, because of that, there is a sense of urgency and a limit to the number of targets that can be made in 2018.

The targeted races will be based of 3 major factors and a number of unique circumstances.

- Average cost of a victory for the last 3 election. Along with this campaign finance laws in the state and county must be considered. If prohibitions restrict fundraising or expenditure, it will impact the targeting score.
- Low win numbers, allow for more direct access to voters, a more striking impact from GOTV efforts, and an ability for our candidates to be in front of constituents. It is also much easier to forecast dollar:vote ratio.
- Smaller media markets and high social media saturation. This is critical to breaking through the two party white noise. The smaller the market, the cheaper it is to advertise, the easier it is to reach maximum saturation.

We have identified 7 states where the average cost for an election, coupled with win number and media markets create ideal circumstances for targets. Most of the targeted races will take place in these states. A majority of the states identified are in the same area of the country, this will allow fungibility of resources, and a smooth and efficient way to shift resources as the political landscape changes in each of the targeted districts.

Other Steps:

To give maximum support to the targeted races, there will be boiler plate themes and templates that will be used throughout the targeted districts. These templates will be customizable, but adhere to a general theme to create continuity and ease of production. Many of the states that have targeted regions share a transient property in the voting public, and having a recognizable theme will develop voting habits and increase results across the states.

Right now, a number of template designs are being developed and tested to be used. These will not be exclusive to targeted races. These templates will be available to all candidates if they would like.

## **Candidate Recruitment Specialist Report (Cara Schulz)**

### **Goal: Creating a Candidate Workbook.**

One of the first questions I am asked, usually by first time candidates, is what help of information we can give them to be successful candidates. They are often nervous and unsure how to take the first step. To increase the probability that a prospective candidate would become an "on the ballot" candidate running an effective campaign, I wrote a manual on the basics of running for office in fill in the blank form. The book walks them through every step, is practical to the realities Libertarian candidates face, and is over 100 pages long. It also includes a Resource page to connect them to mentors, PACs, and volunteers.

Feedback on the workbook has, so far, been extremely positive. Several candidates, especially those who have never run before, told me they filed for office since they now feel comfortable that they have a plan. I've given a few states the raw file so they can tailor the workbook to their specific state.

After each campaign season we will update and add to the workbook. This will become a place to house institutional knowledge.

### **Goal: Making Sure Each Candidate Prospect Who Contacts us is Emailed Within 2 Hours and Called Within 24 Hours.**

Originally this was not met because of the process. A lead would come in, it would take 7 to 12 minutes just to transfer the information to a spreadsheet so it wouldn't be lost, another 3 to 5 minutes to email them back. If there were multiple emails arriving in the early morning or evening or other times I was not at the computer, those leads sat for hours.

With the help of Andy Burns, the process changed 1 week ago and the response goals are being met. Now when a prospect fills out the web form, they are automatically emailed back a welcoming email that includes our new Candidate Workbook and a request for what times work for them for me to call them. I am often able to call them back within hours.

This is giving prospective candidates, many who are not yet LP members, a positive impression of the LP as a professional and welcoming Party. State Chapters are also starting to report back that when they talk to these leads, the lead is better prepared for the conversation and have a more realistic idea of the costs and effort needed to run.

### **Goal: Assisting Newer State Chapter Candidate Recruiters in Developing a Plan for their State.**

Many States have newer leadership and this is also true in their Candidate Recruiters. With some state, I've worked them to designate a person other than the Chair to be the initial POC for prospective candidates. Once they have a person designated, they ramp up fairly quickly.

Other states have a POC, but don't have a plan in place to actively seek out candidates. I helped 4 states develop a plan to recruit candidates and 6 others have come to me for assistance on specific needs or projects. For example, Missouri wished to have a set of serial emails to use to help them prospect their database. After creating this for Missouri, I also offered it to all State Chapters.

As other states hear about my willingness to assist, more are now coming forward with requests.

### **Goal: More Time on Phone Prospecting**

Currently, 2 to 3 hours per day is wasted on data entry type tasks. Contact information and notes on potential candidates is transferred to a separate spreadsheet for each state, which can also be accessed and edited by the State Chapter Candidate Recruiter. Not all States have begun accessing those spreadsheets, but more are starting to do so. If an action needs to take place for the prospect, it needs to be scheduled in a calendar. If that action needs to be taken by the State Chapter, I need to call or email them to get this scheduled. This process consumes minimum of 10 hours out over 40 worked.

The solution is a CRM program. Working with Andy Burns we are testing a CRM program out with a few states. Information from web leads would be entered automatically, actions can be scheduled with a simple click, and anytime I need to pass information to and from a State Chapter this could be done automatically. States could free themselves from their own outdated or expensive processes. The LNC would also have real time access to how many candidates we have in the pipeline at any given moment and where they are in the process.

Several State Chapters are extremely interested in this. Some of the resistance from States to updating our spreadsheets and going over prospects by phone is the feeling it is a waste of their time and too much trouble.

For every hour recovered from data entry or administrative work, 20 to 30 prospecting calls can be made. CRM could result in 200 more calls per week.

## **Goal: Comprehensive List of Candidates**

Having an updated and accurate list of elected Libertarians is difficult, maintaining a list of candidates is even more challenging. Each State maintains its own list of candidates and sets its own criteria for how a name is added to the list. Some states count only those who make it on the ballot, while others include those who file. Other states include anyone who expresses interest while a few won't count those running nonpartisan races a LP candidates.

We established a criteria for all states to follow when interacting with the LNC. The criteria is any person who has expressed interest in a specific race, is a LP or State member, and has been screened for suitability.

States are just starting to update this information and I'll be calling those who haven't yet done so.

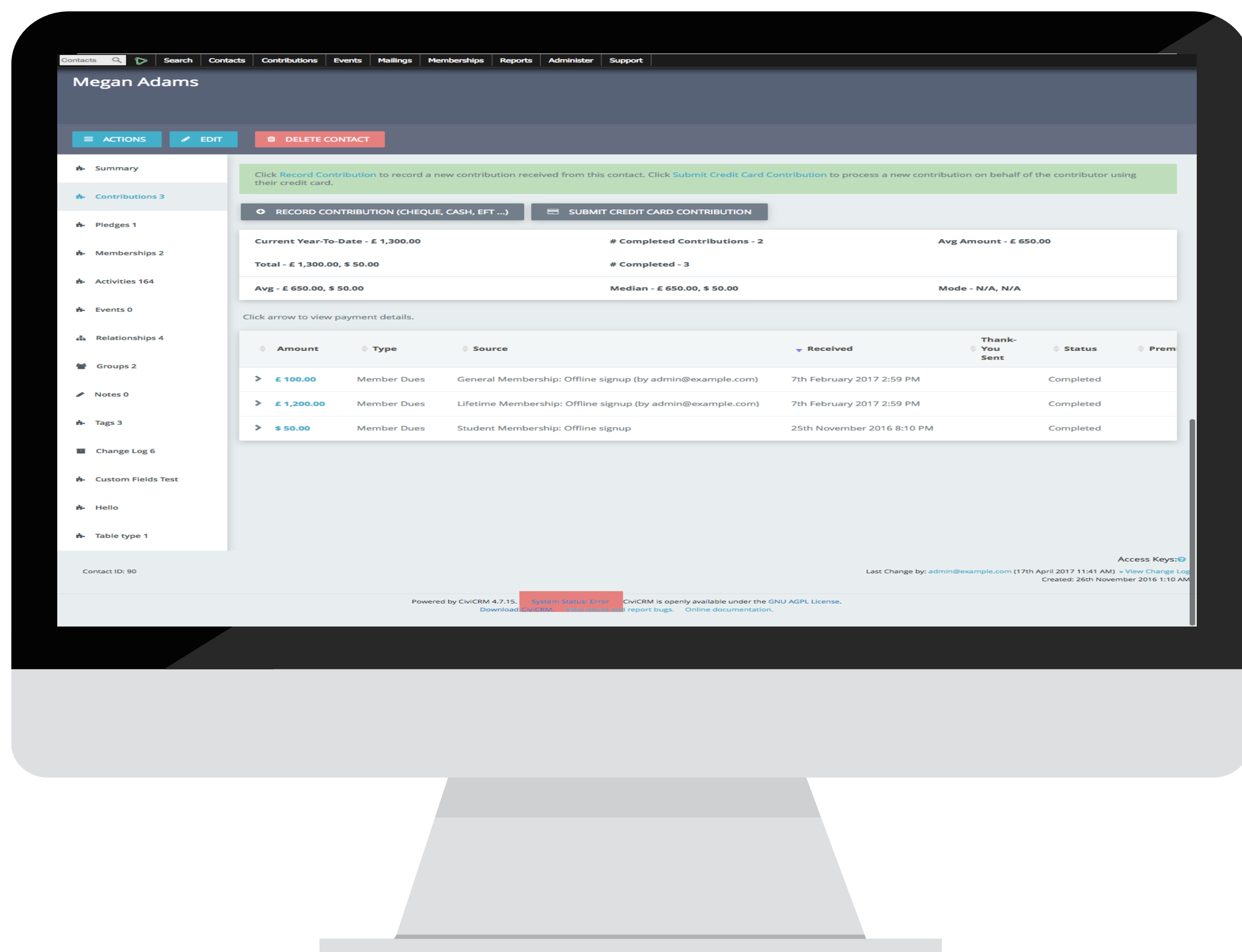
This list will be very beneficial to the LNC and State Chapters, not only to track election results, but for finding the most effective ways to ensure more of our prospective candidates reach the ballot and elected office.

After the election, we will survey those that dropped off to find out why they didn't make it onto the ballot, win their primary, or win their election. What knowledge or resources they felt could have made an impact in their success. Instead of making anecdotal assumptions, we will have more reliable knowledge at what our choke points are and how to fix them. Each election season we will become more effective.



# STATE CRM PROJECT

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



**Created by**

Andy Burns  
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LNC 2017 Q4 Meeting

Introduction

Vision | Strategy | Partners | Platform | Progress Update | Costs

What We've Done	What's Next
<ul style="list-style-type: none"><li>✓ POC Phase completed</li><li>✓ Established relationships with partner orgs</li><li>✓ 4 states have access</li><li>✓ Core functionality implemented</li><li>✓ Researched major custom development options</li></ul>	<ul style="list-style-type: none"><li>✓ Work with open-source community to develop shared tools</li><li>✓ User dashboard</li><li>✓ RE automated data loads</li><li>✓ Mailing program optimized</li><li>✓ Other Phase 2 projects</li><li>✓ Adding more states</li></ul>

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.

It is very much a modular approach to building and maintaining it. We work to find the best people to carry out various sub-projects or routine tasks. This allows us to be nimble and adjust as needed. e.g. No monopoly or long-term contracts. Vendors prove they are the most capable at executing a given task.

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.

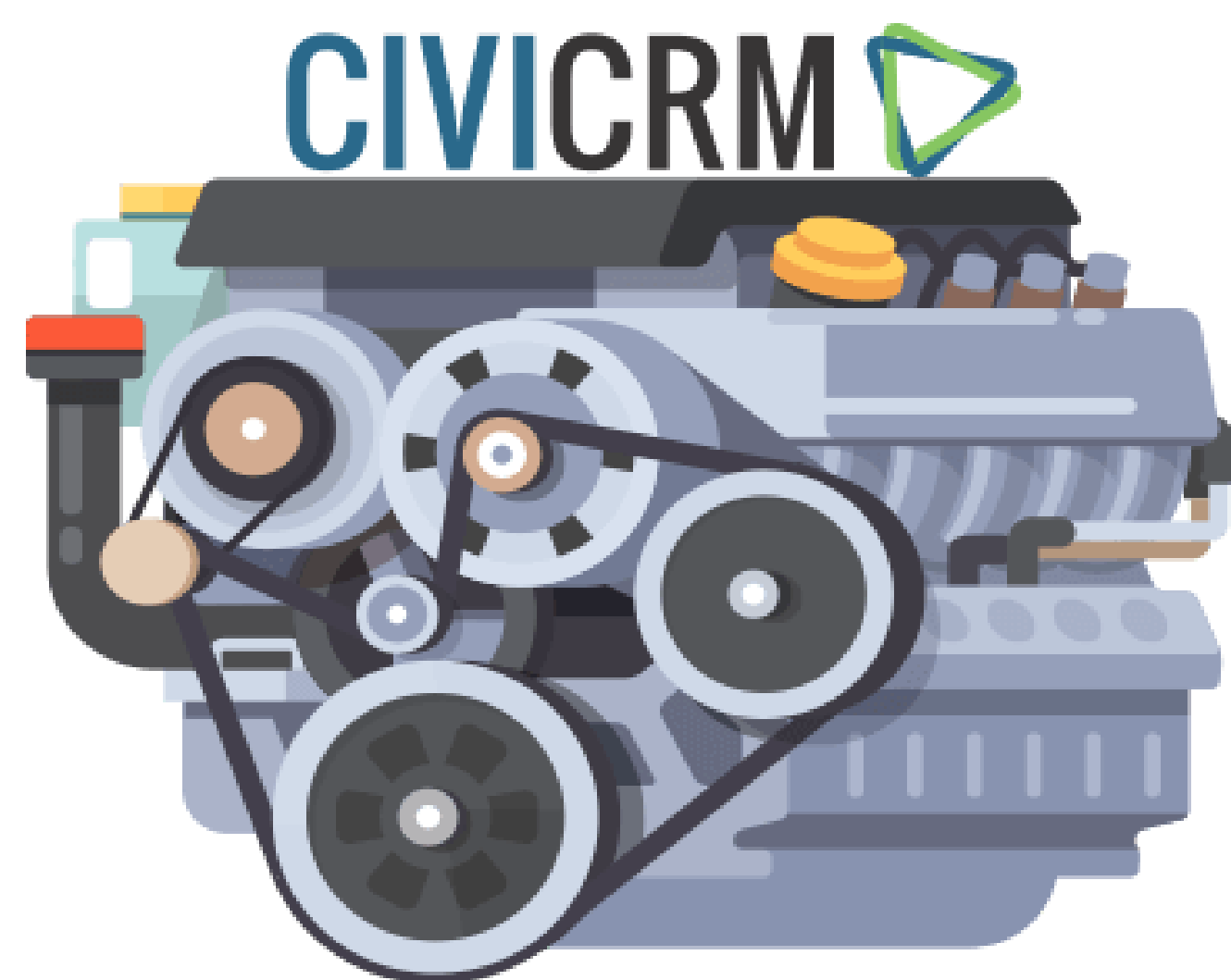
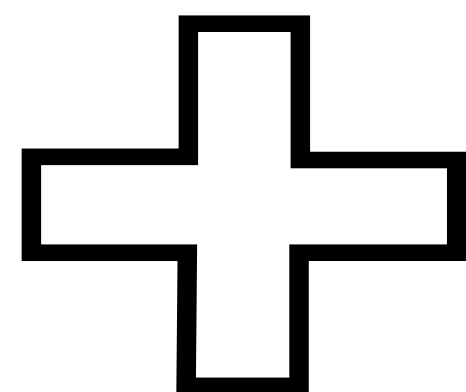
# Vision

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 Comparisons

This Project

\$70K one-time cost

\$12K max operating

✓

Other Project Proposals

Range from \$100K-

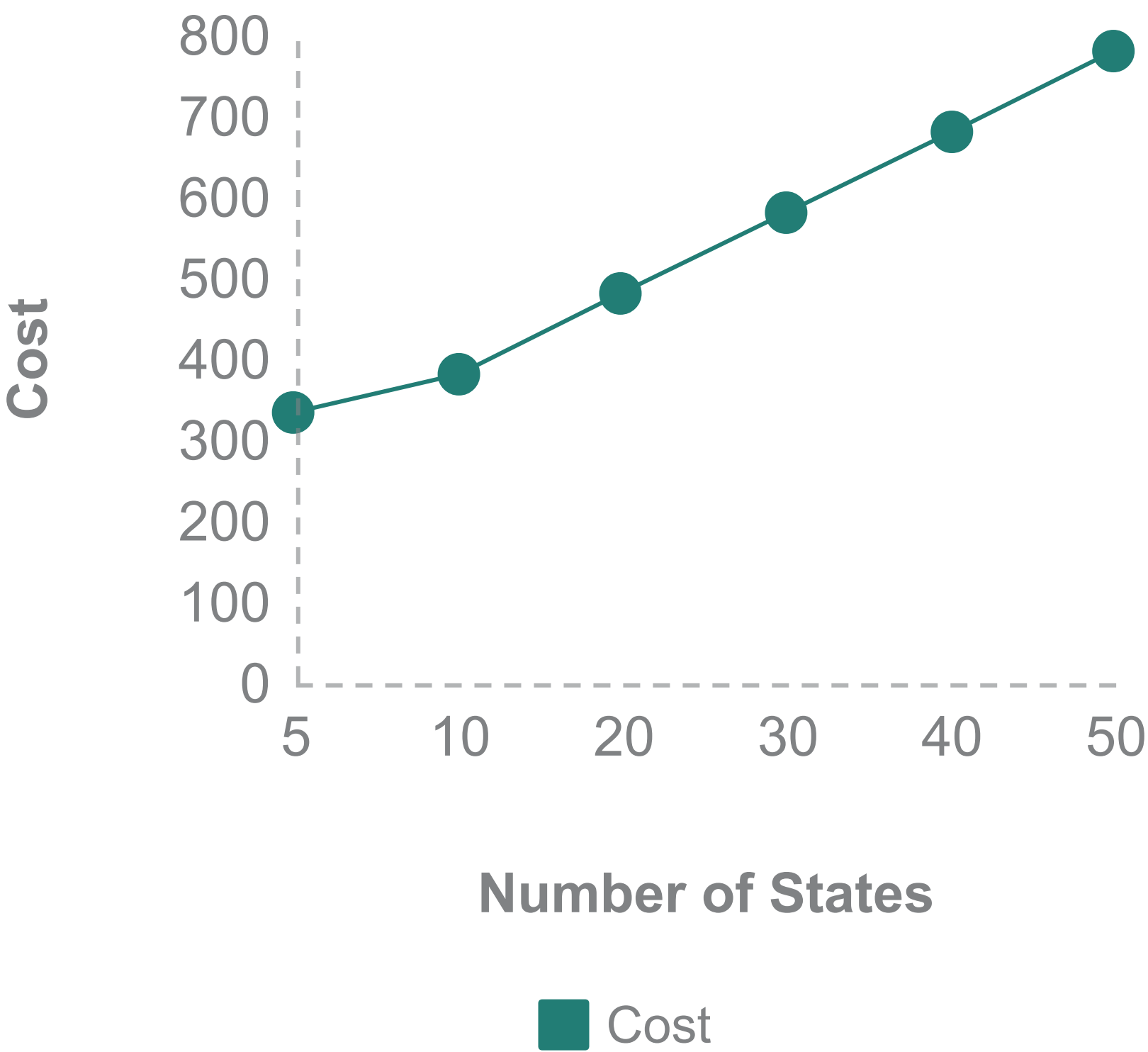
\$140K annual cost

✗

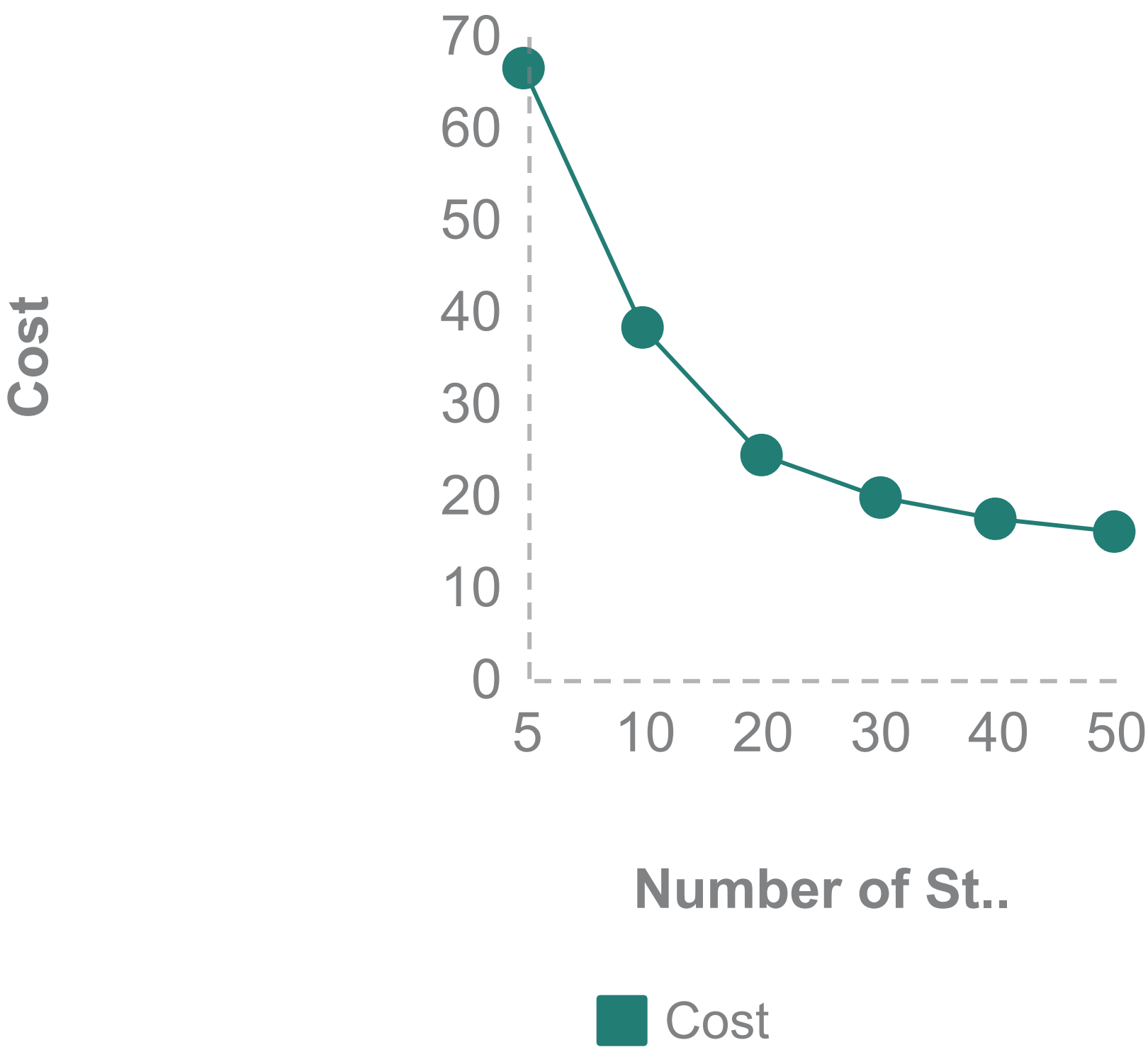
The key to our success is proper planning. The other proposals previously would include software from NationBuilder or Raiser's Edge that would give us similar functionality.

## Operating Costs

Total Operating Cost



Additional Cost to add a State



The current monthly operating costs is \$340. 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](http://lpar.org) and clicking Donate or Signup. Once it is implemented on one state, it is trivial to do so on another.



## Proper Infrastructure

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

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



## Data Imported

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.





## 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](http://my.lp.org/run), with more effective marketing to motivate members to run.

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## 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](http://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](mailto: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](http://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

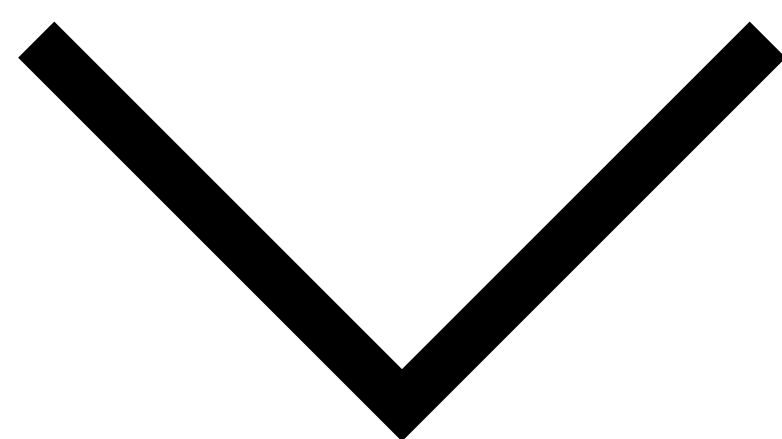
- Log phone calls quickly
- Re-engage aging contacts to cultivate new members and volunteers
- Follow-up with incoming leads
- Reach out to their county contacts for various initiatives

## Alternative Approach to Gathering Funding for the User Dashboard

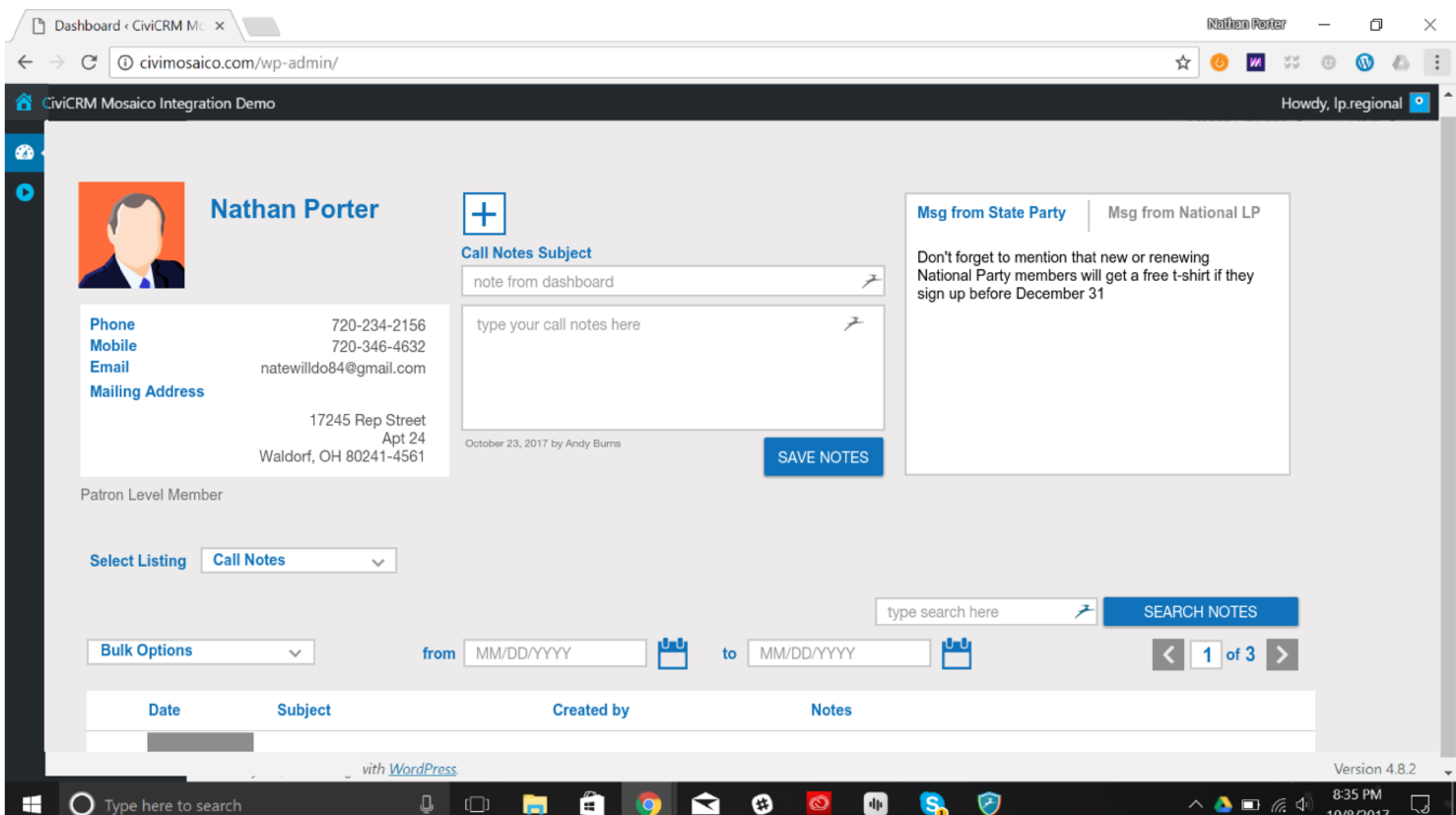
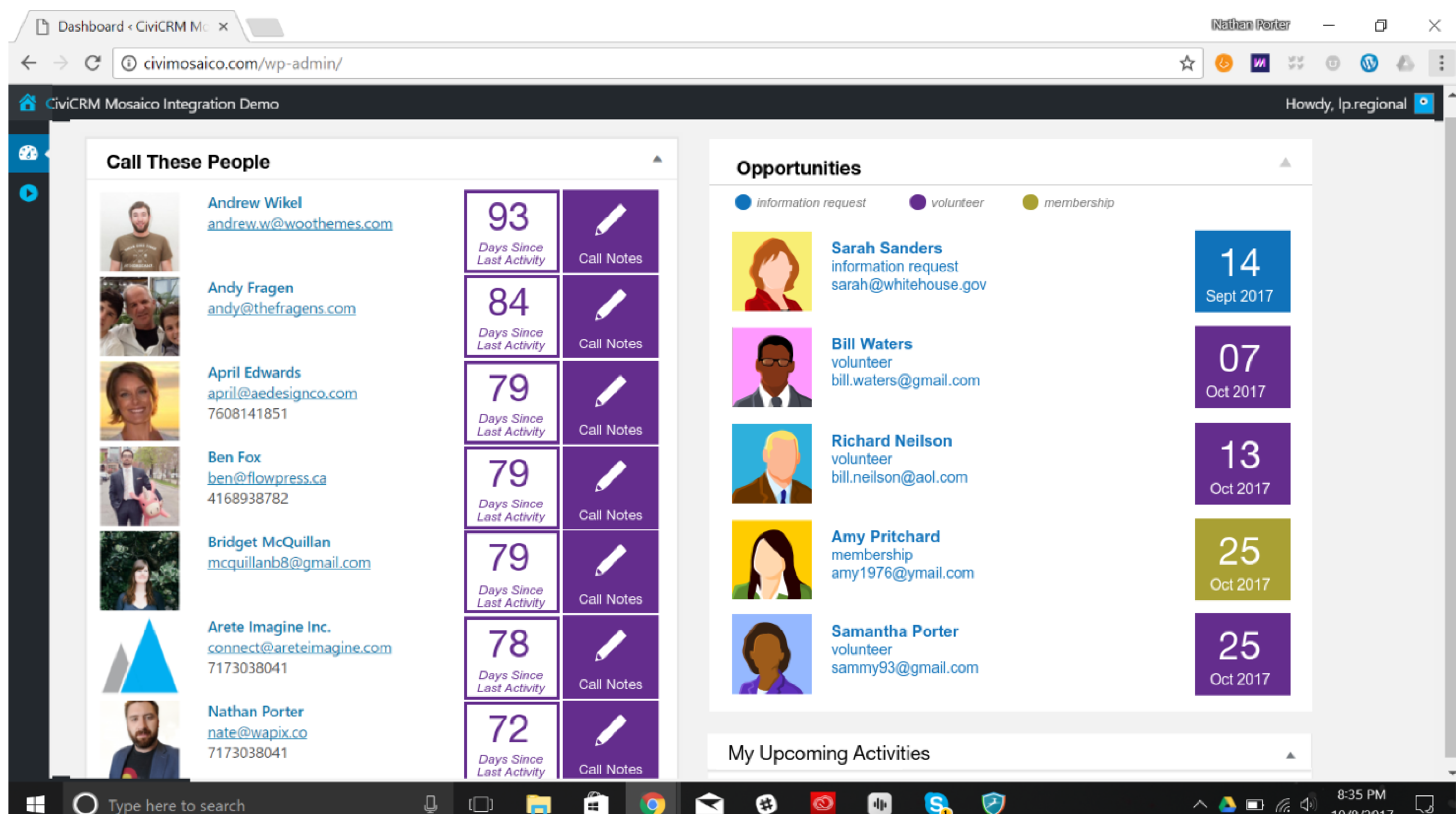
We are continuing to explore the best route to acquire funding and to ensure proper maintenance of any custom development we do. This would entail finding other nonprofit organizations willing to pledge financial support for dev and annual maintenance of plugin/extension

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







Cost: \$51,000

Note: this is the total cost of the User Dashboard. Our best case scenario is to find others interested in sharing the cost of development.



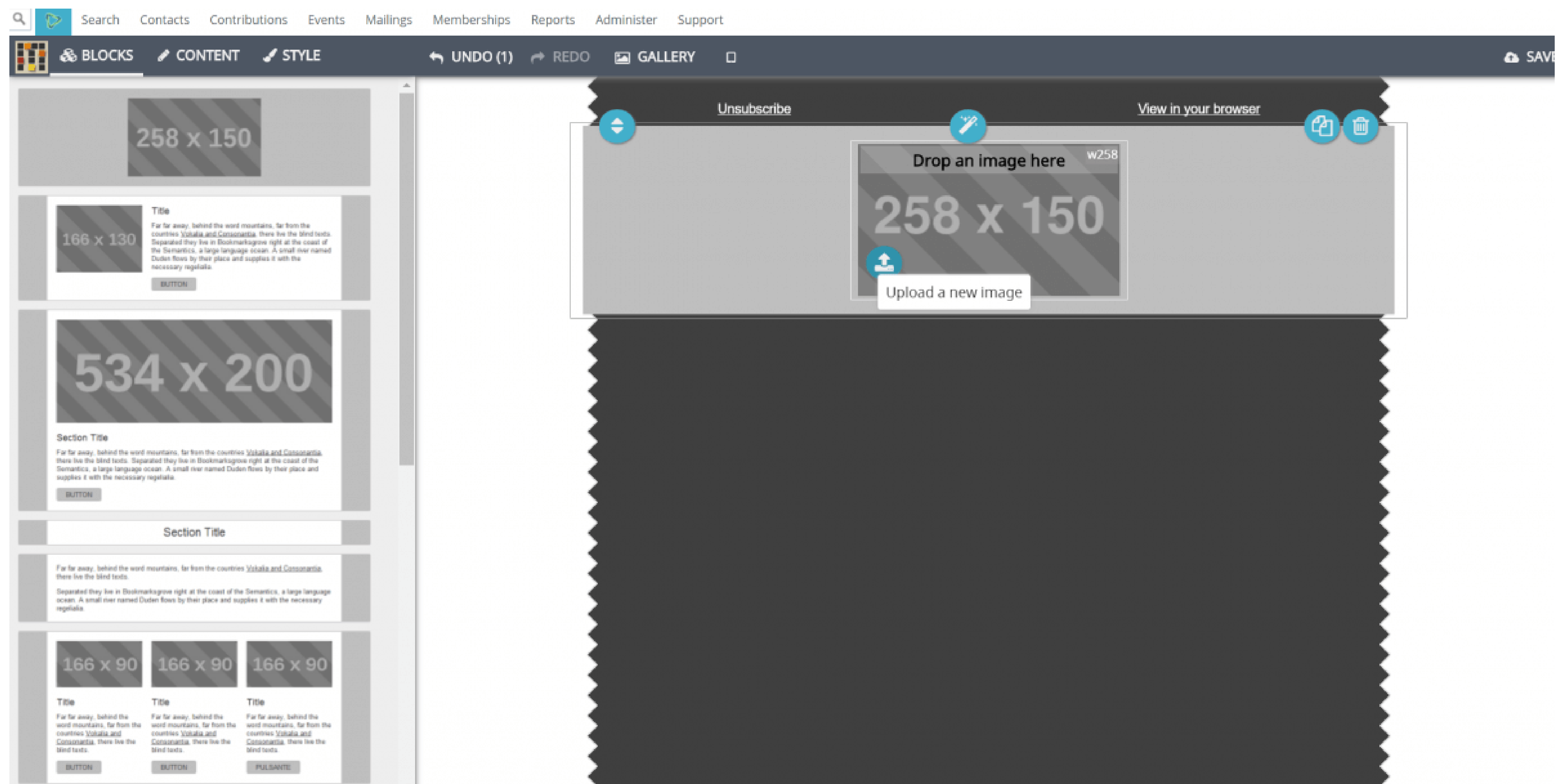
# Mass Email and Proper Permissioning

## 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

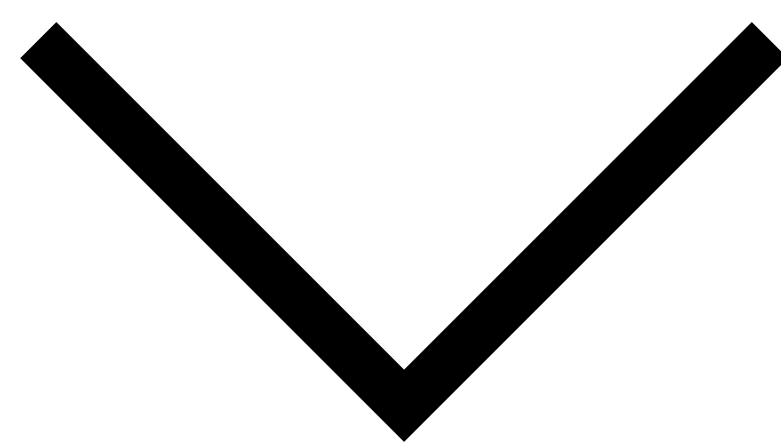
## Summary

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®



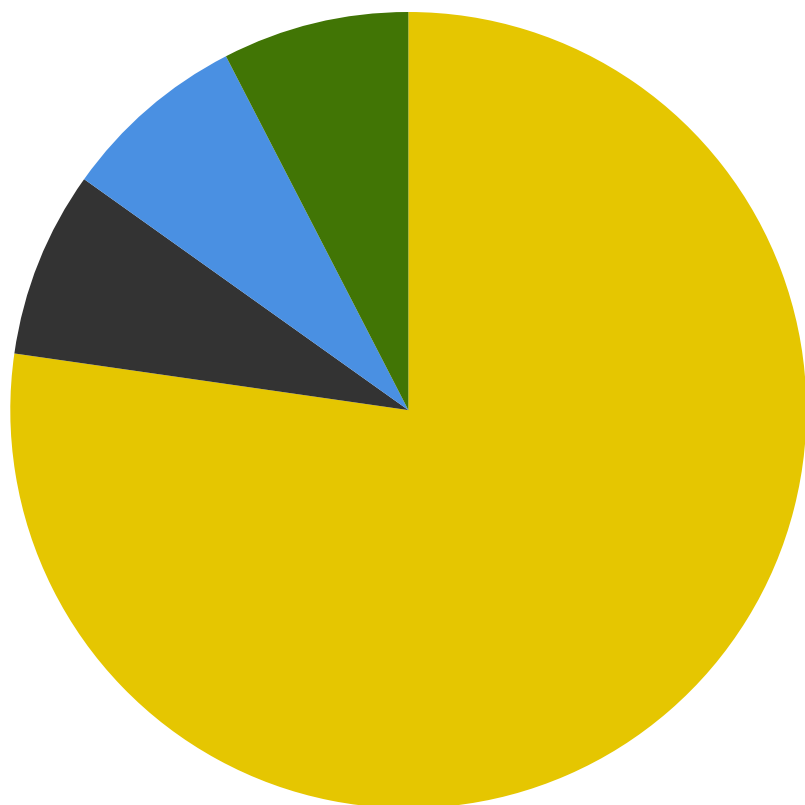
Cost: \$4,000-5,000

**Conclusion**

**\$15,000 minimum for FY 2018 from LNC**

Our request is to allocate a minimum of \$15,000 to the project in 2018 with \$5,000 to cover operating costs and \$10,000 for development.

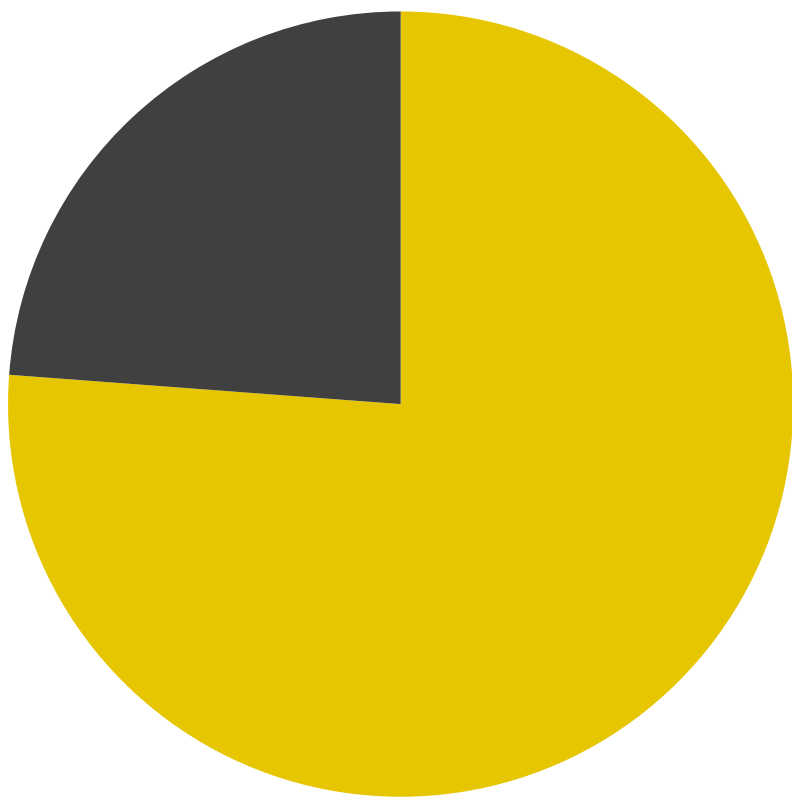
One-Time Development Cost



- User Dashboard \$51K (77.27%)
- RE Monthly Data Loads \$5K (7.58%)
- POC Phase \$5K (7.58%)
- Mass Mailing \$5K (7.58%)

Total Cost: \$66,000

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.

Consistent with our strategy, we are wanting to develop enhancements with other organizations and CiviCRM itself. This means that we are looking to cost-share development with other similar non-profit organizations that would be keen to see similar enhancements. Note if we are able to partner with others in the development it will be lower than \$66,000.

To donate, go to [LP.org/CRM](http://LP.org/CRM)

# State CRM Project Supplemental Information

## How To Donate

Interested supporters can go to [lp.org/crm](http://lp.org/crm) and either join/renew their LP membership or make a straight donation.

## Videos

We have made some video tutorials for our Wiki. These may be helpful to see the current progress of the system.

[Contact Dashboard](#)

[Logging a Phone Call](#)

[Adding A New Individual](#)

[Performing Basic Searches](#)

## Service Agreement with States

This is a complimentary service of the national party. The national party does its best to provide solutions to help your state grow. If you would like to see the system improved, the best way is to [donate](#). You can also help by giving user feedback and defining your core needs. We do our best to improve the user experience and functionality as our time and resources allow.

## Scope and Functionality

Please see the [CiviCRM book](#) for core capabilities.

## National Responsibilities

1. **Software Updates:** National is responsible for updating the software in a consistent and responsive manner, both in WordPress and CiviCRM. CiviCRM will be updated on the first Sunday of each month.
2. **Importing of External Data:** National will import external data sources such as Raiser's Edge and Aristotle. Raiser's Edge data will be imported on a monthly basis. We anticipate Aristotle data to be imported annually.
3. **Migration into CRM:** National will import their current set of data provided it is in CSV format. Membership lists, email subscribers, etc. We will attempt to match the 'look-and-feel' of the state's site to the best of our abilities. National makes no guarantees on exactly matching the 'look-and-feel' for those not on our National LP platform at WPEngine.
4. **Training:** National will maintain and add to this wiki as user feedback directs us. We will train "State Admin" users (no more than 2 per state) on a 1:1 basis.
5. **Backups:** Backups are done nightly around midnight.

## State Affiliate Responsibilities

1. **Add-on Services:** State affiliates are responsible for add-on costs regarding email and SMS services. The system allows for each state site to connect and establish their own account with a SMTP mail service and SMS service provider.
2. **Users Management:** Affiliate state admin user(s) will add/remove their users. Currently, this is a technical limitation however the authority with user management and who has access to the system rests with affiliates. National may do the physical adding until technical limitations are resolved. National must be notified of users added so they can be added to the Wiki.
3. **Updating Form Recipients:** Affiliates need to update Forms recipients within WordPress.