

Affiliate Development Specialist 2018 Q1 Report

By: Andy Burns

My work is focused on providing global support to all affiliates through various systems. This maximizes our resources and impact and at the same time, improves affiliates operational efficiency. While I sometimes do one-on-one support, this is a secondary focus.

Statistics

Because we're all about data let's provide some numbers.

LP National Affiliate Services (States on each system)

Website	CRM	Email	Ticketing
17	15	8	3

CRM Project Overview

The project has been gaining momentum as we add more states and integrate their data. 15 states now have access to the CRM (not all have migrated their entire data set). There is a total of 104,377 individual records. The states are at different points on the migration continuum as they work on the checklist.

Our next sub-projects (besides the on boarding of states) are to tackle the user dashboard, a volunteer opportunities directory, and integration of SMS sending. **We really need more attention in regards to funding to take the project to the next-level** and could use some volunteer PHP developers to supplement these efforts.

We have consulted with 3 vendors on the user dashboard and it is safe to estimate a projected cost \$40,000 - \$60,000. A hard quote will be completed no later than May 18th.

Our \$10,000 annual funding is made up of roughly half managed hosting and half development. We have spent the \$5,000 for the dashboard discovery. This means if we run into issues that are irresolvable internally, we will have to tell states that they will have to deal with a short-coming. This has been the case a few times already. This is not a good situation

to be in but we are doing our best on a very modest budget. Ideally, any project budget should have a cushion to work with.

Similarly, development will slow significantly without further investment.

I want to give a special thanks to Ken Moellman in his lead consultant role with the project and to Ryan Waterbury, Ryan Graham and all the State IT Directors and users who have given feedback to shape the system.

Why we are doing this, the short version

Our path to overall success begins at home. Whether it's growing a local county affiliate, or running a winning local campaign, we must grow the party at the ground level.

This means establishing well-organized county parties nationwide.

However, the Libertarian Party does not have the infrastructure that our opponents do. An honest assessment tells us we are vastly behind in this department. Our national CRM works for national staff but not the entire party. Something more is needed to serve our affiliates and candidates.

For example, many states are using inadequate or obsolete technologies. They often work from spreadsheets. This was sufficient in the 90s, but with expanding datasets this has become an ever-increasing nightmare which often makes our state affiliates less efficient and less effective. Alternatively, each state could spend between \$2,000 and \$12,000 per year to manage their data in a database. However, even this would not guarantee data management success as a database administrator is still needed to make the tool work for them.

Or, the national party could step in and help with economies of scale, and facilitate a larger database that is built for Libertarian leaders and activists and which saves money for affiliates all across the country.

The project will revolutionize how volunteers work. We'll empower them and they'll stick around. We'll cultivate new members and volunteers because we'll be empowering more

people to do the work. . We'll help Libertarians nationwide to organize locally, collect signatures more efficiently, and better targeting with our messaging because we'll have the data to do it.

Overall, we have assembled the right ingredients to make this project a success. The missing ingredient is the proper funding commensurate with the benefits it will deliver.

Benefits

Time saver for volunteers

Volunteers are able to focus on outreach and leave behind the worries of back office operations and overly technical administration. The system just works.

Grow membership

States actively have the most current data on hand and it's put in the hands of the right volunteers locally to effectively engage new members

Empower volunteers and build community

When we provide tools that allow volunteers to make a difference, we empower them to advance the cause of liberty

Effective GOTV Outreach

During those critical last days, GOTV efforts can determine who wins on election day

Increase turnout at events

The start of a great campaign begins with face to face conversations; building the team necessary to effectively carry the libertarian message

Greater synergy for entire party

Long-term, national and states leverage each other's efforts by using a cohesive, integrated system

Testimonials

Stephen Wait - LP Arkansas (Treasurer)

"The CRM has already been extremely helpful by allowing us to generate reports showing current members, donors, volunteers, and event participants. What formerly took a lot of time to compile can now be done with a few clicks of the mouse."

Ryan Graham - LP Georgia (Vice-Chair)

"With the implementation of the shared hosting and email functionality provided by national affiliate support, LP Georgia is estimated to save nearly \$2,400 on platform costs for this year, and an additional \$400 in payment processing fees. The tools provided are going to enable Georgia to get more done while saving money, allowing us to put funds into projects more directly related to our mission."

Jason Brandenburg - LP Michigan (Treasurer)

"This tool has saved me a lot of time and is a snap to use. The interface is easy to learn and the results are instant. Great upgrade for membership data management!"

Andrew Kolstee - LP New York (Communications Director)

"While we have not yet completely have our data feeding into one place, it is making it easier to keep track of volunteers/donors/prospects to reach out to. Integrations with forms on our website are both visually appealing and not only send data to who collects the submissions, but it also stores them in one place instead of getting lost whenever we have new people taking the positions....we would certainly benefit from a user-friendly interface so I can train people to use it (without being tech-savvy). I would hate to have a dedicated volunteer make 1,000 phone calls over the course of several months only to lose whatever information he learned when someone took over his position.. "

User Dashboard

We have contracted with a web development firm that specializes in our Wordpress and CiviCRM configuration. Their work is centered around a user dashboard that will permission users so that any volunteer in the nation can get proper access to their data and start connecting and organizing to build the grassroots force needed to run a party and campaign.

Key Points

- Minimal training (less than 10 minutes), the first time a volunteer gets active it will be a positive experience
- We present them the data they need and not the rest that would get in the way or be of privacy concerns
- Enable any county in the nation to better organize
- A foundation to a call center system and email segmentation
- The National admin, state admin, state leader, county leader, county volunteer roles have a symbiotic relationship to getting volunteer work done

Pulaski County Contacts Add New Search Contacts

Search Operator And Or

Members
Volunteers
Issues and Demographics

Actions Filter

<input type="checkbox"/>	Name	Phone	Email	City	County	Last Phone Call	Volunteer
<input type="checkbox"/>	Barry Livingston	745-650-2160	barrywhite@gmail.com	Little Rock	Pulaski	October 31st, 2017	
<input type="checkbox"/>	Kelly Stone	745-650-4580	kstone@yahoo.com	Roland	Pulaski	June 2nd, 2017	
<input type="checkbox"/>	Jennifer Wrigley	745-260-1059	jwrigley@hotmail.com	Maumelle	Pulaski	November 1st, 2016	
<input type="checkbox"/>	Ron Edwards	-	ronedwards@gmail.com	Jacksonville	Pulaski	-	
<input type="checkbox"/>	Ashley Jacobs	612-462-2074	ashleyj12@gmail.com	-	-	August 16th, 2015	

KS Kelly Stone

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Age: 32
Gender: Female
Privacy: Do Not Mail
Email Subscription: Yes

Msg From State Party | Msg From National LP
Don't forget to mention that Mark West for Governor needs help petitioning to get on the ballot. Go to lpar.org/MarkWest to signup.

Log Your Call Last Phone Call March 14, 2017

Subject: _____
type your call notes here

Call Result Save Call

National Member
Expires on August 12th, 2018

State Member
Expired on June 6th, 2014

Volunteer

Last Donation Date to National 8/12/17
Last Donation Date to State 6/4/2014
Primary Issue Taxes
Party Preference Libertarian

Activities Log Type Status

Date	Type	Subject	Added By	Assigned By	Notes
14 Mar 2017	Phone Call	State Convention Reminder	Christopher Olson	Michael Pakko	Said he attended in 2016 for presidential race. Will come if work allows.
2 Jan 2017	Volunteer	Petition for ballot access	Stephen Wait		

Dashboard

My Sites Libertarian Party of Arkansas Howdy, Andy Burns

Opportunities

Get Involved Membership Run For Office

Name	Role	Last Activity
Nicholas Sarwark	Volunteer	Feb 22, 2017
Arvin Vohra	Membership	Feb 22, 2017
Alicia Mattson	Membership	Feb 22, 2017
Caryn Ann Harlos	Volunteer, Start An Affiliate	Feb 21, 2017
Elizabeth Van Horn	Run For Office	Feb 20, 2017
Bill Redpath	Membership	Feb 19, 2017
Sam Golstein		Feb 16, 2017

Past Opportunities

Call These People

Name	Phone Number	Days Since Last Activity
Whitney Bilyeu	735-428-3489	120
Steven Nekhalla	735-302-3578	120
Ryan Graham	735-428-8890	118
Starchild	735-428-1265	116
Erin Adams	735-428-1860	116
Bonnie Scot	735-428-1860	113
Daniel Hayes	735-218-1789	112
Ed Marsh	735-218-1789	110
Joshua Katz	735-218-1789	107
Steven Nielson	612-569-3294	107

More Phone Calls

Searches counties would do

- Registered Libertarians who are not members
- Registered Libertarians who are not volunteers
- Inquires without membership
- Volunteers without any volunteer activity
- Volunteers without any volunteer activity within 6 months
- Volunteers with a volunteer activity within 3 months but not a member
- Party preference is Libertarian but not registered L
- Party preference is unaffiliated

There was a 2 month delay in execution of the contract due to not having the full amount ready to do the dashboard discovery. We signed this recently, and now we are currently in the discovery phase (\$5,000) and we will have this phase done no later than May 18th which will deliver specifications, build requirements and a total cost to complete. This ensures that the build phase goes as smoothly and efficiently as possible.

Proper planning = proper execution.

For some background, we have consulted with 3 vendors on the user dashboard specifically and it is **safe to estimate a projected cost \$40,000 - \$60,000.**

MISC Regarding CRM

Fundraiser

We initiated a 2 week fundraising drive in March. National sent out 1 email and 2 states sent out an email to their supporters. Many thanks to Daniel Hayes for his instrumental work in leading this.

We raised \$6,580 from 75 contributors.

Data Dumps

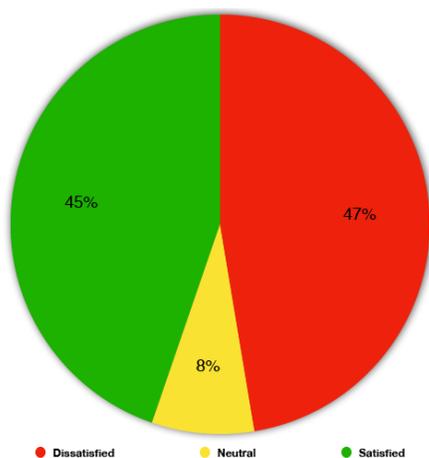
States have typically under-used the data dump national provides to states. It was only in the hands of a few and would rarely make it to the grassroots. Now, we are on the path to getting this in the right volunteers hands. Imports from national are done on a monthly basis. All other data automatically goes into the CRM. One other imported data source we are likely to use is the Aristotle registered L list. Once this project matures, we intend to expand it to the Unaffiliated / Independent voters.

Support Wiki

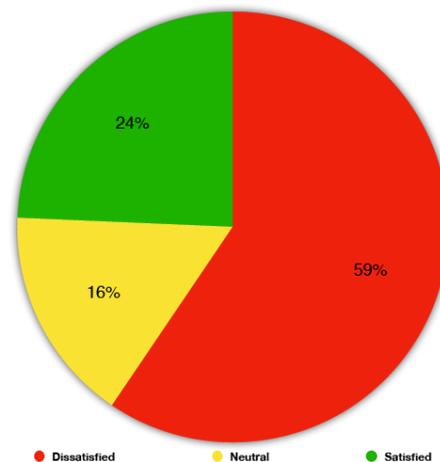
We have created a support wiki for all IT Services at helpdesk.lp.org. LPAction.org serves as a public-facing knowledgebase.

Survey About Volunteer Management

How would you rate your affiliate's ability to start and sustain county affiliates?



How would you rate your affiliate's ability to retain volunteers?



We conducted a survey that had 34 responses mainly from state affiliates and some county affiliate leaders that was two-part, one for current CRM Project users and one for any state and county affiliate leader / volunteer. Out of the volunteer portion we found that affiliates are split with county affiliate sustainability but the larger issue is with volunteer retention at 59% dissatisfaction. This is why a CRM to manage volunteer relationships is so important. More granular representation is below.



Connecting Volunteers to Campaigns

We have begun testing of a volunteer opportunities directory. This would show all campaign volunteer opportunities which helps states and campaigns recruit, manage and track volunteers. This is vital to storing this information in the CRM so state and county volunteers can do searches like these:

- Tell me who has petitioned in [state] within the last 2 years
- Tell me who has phone banked in [state] within 6 months
- Tell me who has canvassed in [county] within 3 months
- Tell me who has worked at an outreach booth in [county] within 2 years
- Tell me who has validated petition signatures in [state] within 4 years
- Tell me who has helped with back-office work in [state] like snail-mailings, data cleanup within 1 year

This directory would integrate within a state's website calendar and show as a national directory in list and map form. We are likely to have it 80% there, however some funding would be helpful to ensure it happens and we avoid cumbersome workarounds. I find this to be one of the next critical components to getting people active locally and turning around our issues with volunteer management.

Migrating States Data

The most intensive part of this work is sorting out a states existing data situation. Some are okay but most have many excel spreadsheets and we have to sort through how data was acquired in the first place. We also work to import their payment processor(s) contribution history.

For example for Virginia, it may take 8 hours to properly piece together their data so it is ready for import. Many thanks to Ken Moellman on this front in helping Virginia take their 30,000 records and 6 data sources and compiling them together.

Ticketing System

Ken Moellman implemented a ticketing system for internal requests. This can be used for any division in a state party (IT, communications, field development, graphic design and so on). Additionally, it facilitates the escalation and communication between party units. For example if LP New York has an issue that needs to go to LP National they can simply re-assign the ticket.

Another benefit is that tasks don't get lost in the deluge of emails and there is clarity on who is responsible for what.

- LP IT Helpdesk
- LP Affiliate Support
- LP Affiliate Support / Graphic Design
- LPKY IT Helpdesk
- LPO IT Helpdesk
- LPNY IT Helpdesk

We will more actively promote this service once a few customizations are done. This service costs \$60/yr (hosting).

I have attempted to steer affiliate support request to this system, though I still process support through my individual email at times.

Since 1/1/2018, affiliate support has received **99 ticket requests** and resolved **92** of those.