**IT Division Report**

**March 03/15/2021**

**CiviCRM**:

Adding people to the CRM is difficult. Hearing from many people on the it group having problem logging in.

March 3rd email from ken.moellman@lp.org the following:

---------- Forwarded message ---------
From: **Ken Moellman** <ken.moellman@lp.org>
Date: Sun, Feb 20, 2022 at 4:20 PM
Subject: About the CRM
To: lnc-business <lnc-business@lp.org>, State Chairs <statechairs@lp.org>

There has been quite a bit of hubbub about the CRM this weekend.  Bad timing, for me, as I had to work all weekend. But now that I've wrapped up work, I have some time to respond to some of the things floating around. Specifically:

#1. The data is legally protected against misuse by those given access. We have an NDA which every person with access to the data must sign, and makes each person accessing the system individually and ***perosnally*** liable for misuse of the data by their hands. Along with that is a requirement that any person given access to the data must also sign the NDA, follow the same rules, return the data once complete, and destroy other copies. Every single person with access to the data must sign the NDA, regardless of the number of hands it passes through. I want to emphasize that there is a ***personal liability*** clause. When JBH and I worked on the NDA, we intended to enforce it against any individual who violated it. If there's been a violation of the NDA, I hope that our current chair and lnc will support enforcement of the NDA. (You will not hide behind the corporate shield of a party or campaign, to the extent that exists.)

#2. The data is programmatically protected against those not given access to a state's data.  Only state chairs and their delegated State IT Director and/or Executive Director are given access initially (based on the State Chair's directive). From there, it's up to a state to decide who has access, with the caveat of requiring the NDA above in #1. People only have access (a) after they've signed the NDA, and (b) they're authorized by their state admin (usually IT director).  Further, users can only access that which is within their "realm"; so a county leader only sees county contacts, a state leader sees state contacts, etc. The only time someone from one state sees contacts from another state is when a state leader can see a particular contact who interacts with another state.

#3. The Policy Manual still dictates that if a state affiliate decides to leave, they are entitled to a copy of their data on the way out. We work with whoever our affiliate is, if they want to be a part of the program,  but we're not holding any affiliate hostage and state affiliates can do whatever they want. That said, if you take the data and branch off into another organization, that likely violates both the NDA and state andor federal campaign finance laws. I would also note that making a decision to leave the program now, in the heat of the insane pre-national-convention rhetoric, would likely be unwise.  We are looking at implementing something like a "re-integration fee" for states who have left and then want to come back, because bringing states into the system eats up the time of staff and volunteers who work hard to bring people into the system.  Onboarding takes 40-160 manhours depending on the size of the state affiliate and the current state of their data.  In other words, maybe wait 3 months before making a rash decision in the heat of the moment, but that's a decision still left up to the state affiliates.

#4. We're constantly improving. We just did a massive upgrade and security patching earlier this week on Tuesday morning. We do security patching regularly. We add functionality regularly. We will continue to make things better. We remain committed to delivering the best product we can, with the resources we have available. We've recently partnered with additional resources to improve the overall experience of our users; I'll personally be working with one of them on Tuesday morning to examine all system permissions and performance. There are many other projects that are yet to come, including automated membership renewal pushes and whatnot. Some of this is already there, but we'll be expanding all the core functions over time, as we always have.

Right now, the focus is on potentially migrating Raiser's Edge into Civi.  This would save the party approximately $31,000 per year that could be, in part or in full, invested in improving Civi. It's all about allocation of resources. If people want to see the CRM get better, I would suggest that **a donation to**[**lp.org/crm**](http://lp.org/crm) would help encourage that development.  Even as a volunteer for the project, donating many hours of time, I am also a monthly donor to the project.  Everything helps.

In the meantime, there are states that are successfully using the CRM. LP Indiana is likely the gold standard in this regard, and huge kudos to them and their hard-earned success. If state affiliates really want to know how to succeed, I would strongly suggest that they follow the lead of Evan McMahon and LPIN.

Ken Moellman

Libertarian National Committee

Vice Chair

On March 4th received email from David Aitken’s that you can set up Google Authenticator as a backup method and the link to find that information. <https://helpdesk.lp.org/wiki/logging-in/>

Still working on pending user and still finding problems. David has been addressing any problems we are having but it is slow going.

Not sure it’s a good idea to fine a CRM Director since there are so many problems.

**Voter’s Roll Purchase 2022:**

Stil waiting on when to purchase.

**Webmail:**

Created document for users to use Webmail through browser or CiviCRM. Includes document on instruction from National. Need to know the best place to put this information. If there is any idea’s please email me.

**Website:**

Have forward documentation on what I see as current changes to <https://lpillinois.org/> to Preston Nelson. Need to work with him on getting setup. He did touch base with Lex Green on training.