**IT Division Report**

**April 2024**

**Previous projects / activities-**

**Convention Site requests (convention has concluded)**

**March - April requests/ Activities:**

* CRM / Convention registration training (ongoing March 1st -9th )
* Assisted Members with various email/lpmail and Civi CRM login requests
* Publicized the 2x weekly CRM Training sessions hosted by National IT  <https://my.lp.org/events/category/crm-user-orientation/>
* Registration / Badging/Credentials March 8-9 during Convention
* Support / assist Presidential Candidate’s tabling / space after registration
* Sent Day of Convention email memo to all members per Chair’s request
* Convention wrap up / Website page archiving
  + Uploading of top images/pictures for permanent viewing?)
* On-boarding 2 new IT Division Directors, Gabe Carrier(CRM) and Jarrod Weishaar (web)

**Table of Convention 2024 requests / tickets / status:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Convention Committee request** | **Platform** | **Owner** | **Status** | **Date of resolution** |
| Remove Sponsor/vendor page | lpillinois.org/Civi CRM | IT Web/ National | Completed | 3/10 |
| Prepare OpaVote for National delegate voting | OpaVote | IT Division | Completed | 3/9 (vote tool not needed) |
| Update wording on 2024 Convention page | lpillinois.org/ Civi CRM | IT Web | Completed | 3/10 |
|  |  |  |  |  |

**IT Requests (non-Convention):**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Request/request by** | **Platform** | **Owner** | **Status** | **Date of resolution** |
| Modification to leadership pages for additions/resignations (4 requests) | lpillinois.org/CRM IT Web | IT Web | Completed | 3/30/24 |
| Field Ops/ P DiMasi Lake Country membership | CRM | IT / CRM | Resolved / report sent | 1/17/24 |
| Volunteer training | CRM | IT / CRM | Ongoing | 3/6/24 |
| Host IT Project calls | CRM/lpillinois.org | IT / CRM | 1 March 25th , 1 on April 2nd | 4/2/24 |
| Add new Petition Drive for Ballot Access page, w Letter from Chair Redpath | lpillinois.org | IT Web | Completed, with link to official petition | 3/23/24 |
| Extend OpaVote access to ExCom (Secretary) for County / SCC Elections/ Conventions | OpaVote | IT Dir | Provided Secretary w Credentials | 4/16/24 |

**Help Wanted:**

The IT Division is now fully staffed. Thank you to our members/volunteers!

**IT Division conferences in March – April 2024:**

1. **CRM Evolution call** with Andy Burns (AB Consulting) **March 25th**

**\***Affiliates contracting with AB for a new version of CRM environment will have a one-time migration and recurring costs, depending on how many other affiliates also join on . IN and OH so far (KY is pending) **Note: Current CiviCRM is at $0 cost to the LP of Illinois.**

**Notes from call:**

## Mar 25, 2024 | [LP Illinois CRM call](https://www.google.com/calendar/event?eid=NjVwcG82ZHRiaTIyc3Fpb2pzdmdiampqb2sgYW5keUBhbmR5YnVybnMuY28)

Attendees:

* [Andy Burns](mailto:andy@andyburns.co)
* **Bob Blair-Smith II**
* Carter Mitchell (A)
* **Jarrod Weishaar**
* Kelly Liebermann (A)
* Lex Green (A)
* Quentin Sanders (A)
* Gabe Carrier (A)
* **Ken Mattes**
* **Bill Redpath**

# Introductions

* Andy Burns background
  + LPMN / Affiliate Development at national / CiviCRM consultant
* Has fundraised and petitioned on the LP Illinois team in past years

## Current CRM situation

* Issues
  + Census info: district data updates
  + Server instability
  + WP menu
* **Access:** Service was set up as in SaaS mode. Service then degraded due to fundamental priorities changing, poor staff environment and staff pushed out. The issue is instability at the national level over the long-term. Being a SaaS-oriented solution, states relied on the LNC to maintain and provide support (directly or through vendors) which had massive economies of scale benefits.
  + 2.0 phase was in progress to improve multisite access and offer paid plans for states: Was already a goal with LPIN when on LNC CRM Network: They were **already outgrowing the baseline level of support offered** and in search of a higher level of support and control.

Very simply, they desired a paid plan that allotted full access to WordPress and CiviCRM and additional support hours if any issues arose and for strategic guidance.

Solution: this is now done with LPIN owning their system now

**Lack of maintenance:** Not a priority for National. Running an insecure version of Civi and limping along

* **Not investing / divesting in future**: No plans for future improvements ***(not exactly true per 2nd call April 2nd)***

## New CRM Outcomes

* Full access to maintain website
* Full data administration in this version of CiviCRM. Administering CiviCRM data (imports, reports, Search Kit, Form Builder)
* Ability to maintain, adjust and roll out new features as you wish without any bureaucracy (asking a middle-man).
* Connect county sites and payment processors
* County affiliates mass emailing
* A responsive support model that is clearly defined and your their needs
* Immediate access at all levels for a relevant volunteer based upon your position the party
* Volunteers focus on “sales” and not on back office operations or system setup
* Leverage local volunteers to recruit and retain state party members
* Quicker outreach to new signups to invite them into local affiliate activities (events, campaigns)
* Maintain data under one umbrella encompassing county affiliates
* Build supporter data for future candidate campaigns
* Data retention and improvement (avoid changing systems every couple board terms that creates instability within the LP)

## Notes

* LPIN and LPO, demo
* System architecture
* County integration
* Data migration
  + Contacts
  + Contributions
  + Memberships
  + Participants
  + Stripe recurring payments
* Timeframe
* Q & A. Costs: ***not disclosed, dependent on other state affiliates also signing on to new version of CIVI platform***

1. **National IT Admin Call – Call April 2nd: notes:**

**Zoho** is a new CRM to be used for Fundraising - -Zoho **is not** a replacement for CiviCRM

* all the information they collect used from Zoho can be automatically updated in Civi
* **To get IL State and US Cong districts data updated:**
* Aristotle data provider – Andy Buchsbaum from National sent updates to them with the goal to reimport the new data back into CiviCRM
* Aristotle initiative work is still pending - plan is that when ZOHO goes live (already happened) they can import Voter rolls into Zoho and then Aristotle can more easily update Civi data

Server performance:

* There will be an upgrade of Civi to a newer software platform and Staging environment with a required maintenance window to be 2-4 hours early hours AM on a weekend.
  + Not going to happen right away, but after staging server is set up Affiliates using CiviCRM will be notified

**IT Division Open items:**

* Email access for SCC members (Fixed for scc14 Chase Renwick April 17, Julie Fox (scc8 remaining)
* Onboarding new SCC Members Cunningham (1st CD) and Groeling (17th CD)
* Appointing New IT Division Directors Weishaar and Carrier
* Document management (WorkDocs) training for BoD and other volunteers.
  + Link documents to AWS WorkDocs
  + Fixed a DuPage county file link that was not publicly viewable
  + Assist Divisions to migrate older/Archive LP of Illinois docs from personal file services/ PCs to WorkDocs

**Budget:**

* $82.72 AWS (February)
* $77.90 AWS (March)

These costs are rising since Spring 2023 and not sustainable. IT Division will begin to explore other file sharing/document management platforms

**Upcoming / Open items:**

* Website links (in process with new Web Division Director)
* CRM Training Train-the-Trainer) Will initiate this in April
* Candidate details (for 2024)
* Document management (WorkDocs) training for BoD and other volunteers.
  + Link documents to AWS WorkDocs
  + Reduce costs if possible with Workdocs
  + Investigate OneDive/SharePoint costs/options with National / other affiliates
* **Next CRM Evolution –** CORRECTION FROM February 2024 report: National LP **Is NOT** moving off of CiviCRM platform in current form, only adding a Software layer **Zoho** to for *fundraising functionality only*. There is also a possibility that Zoho can facilitate Demographic data fixed which may benefit LP IL and other affiliates with outdated demograhic data.