



LNC Chair's Framework for a Strategic Plan

September 2020

Introduction

All your freedoms, all of the time. 49 years ago, that dream motivated a group of principled, self-reliant visionaries to gather together and reluctantly enter the political arena. Today, the Libertarian Party they constructed is America's third largest political party. Our ideas have gone from hopes to mainstream, our elected officials are voices of principle and common sense in a contentious and tribalistic political environment, our activists are able to make the impossible happen, and our members are generous with their time and money in working toward our shared vision.

The national party has an important role of providing foundational support for these efforts of our elected officials, candidates, activists, donors, and state and local party leaders. Ideas for activism, Membership leads, Strategy, Phone banking and door knocking, Joint fundraising, Talking points, Training, Branding. To build our party to be able to elect and re-elect Libertarians and change public policy, there is much to be done. We must decide how we will prioritize our staff time and financial resources, and what steps we must take to have more donations and activists and elected officials and results. As the saying goes, plans are useless but planning is important. The strategic planning process focuses on defining the goals to be pursued, the metrics by which we measure our progress, the initiatives and steps to take to make it happen, and the clear decision-making rights needed to reinforce success or shift resources away from efforts that fall short.

As LNC Chair, I view my role is threefold: (1) to facilitate decisions, avoiding the extremes of micromanaging or neglect; (2) to create clarity and remove obstacles; and (3) to represent the organization, serving as a nexus between all our many stakeholders. We owe it to our staff, as well as to all those who support our efforts, to do everything we can to provide clarity and transparency about our goals, priorities, and evaluation methods.

Imagine the impact from a Libertarian Party that:

- ✎ Elects, re-elects, and supports principled Libertarians to change public policy
- ✎ Builds & sustains partnerships that provide the resources for our maximum impact
- ✎ Supports and engages a growing membership to achieve results
- ✎ Conveys the LP as impactful & growing, the best option, and worthy of your support
- ✎ Delivers infrastructure and operating practices that seamlessly support our activities

The blueprint for how we construct these results is in the pages ahead. I am grateful to the many people who have contributed ideas to this report. Necessary next steps are refinement, prioritization, and establishing specific goals and implementation steps. Success begets success, so may we have many team victories to celebrate in the months and years ahead!

In Liberty,


Joe Bishop-Henchman, LNC Chair

Candidates & Elected Officials

Goal: Elect, re-elect, and support principled Libertarians to change public policy.

While there are many fine organizations promoting libertarianism and educating Americans about libertarian ideas and policy solutions, only the Libertarian Party can elect principled Libertarians to make that policy happen. The 2018-20 LNC made history in prioritizing building infrastructure to elect Libertarians to state legislatures with the Libertarian Frontier Project: using data and research to identify winnable seats, recruiting principled Libertarians involved in their communities and capable of winning public office, providing branding and strategy help, and training and deploying canvassing and Get Out The Vote (GOTV) teams. Moving away from a direct subsidy model, candidates must raise their own campaign funds and build their teams, but National HQ provides infrastructure, strategic support, and canvassing personnel. After November 2020, which will hopefully see the first Libertarians elected to state legislatures in a generation, the lessons learned from this experience can be used to fine tune the approach and expand it to other promising opportunities in the future.

In addition to winnable races, Libertarians across the country run for office to preserve or gain ballot access, to ensure choices on the ballot for all Americans, or to promote Libertarian perspectives on key issues. Many of these candidates have benefitted from campaign logistics and messaging training provided by national HQ, programs that should be continued and expanded to include media and messaging training, treasurer training, and more. Ultimately, we want to create a pool of talent: people with the experience and ability to be candidates, campaign managers, treasurers, and other roles. We also want to ensure that those officials who are elected are supported in that role such that they can thrive.

Finally, retaining 50+DC ballot access is crucial, as a key asset and talking point for our party. We are the only party other than the Ds and the Rs to consistently have 50+DC access, and estimates of what it would cost to “buy” such access range up to \$30 million per election cycle. We are able to achieve it for a tiny fraction of that amount thanks to a combination of familiarity with the tricks of the trade and a dedicated base of activists who make it happen.

Initiatives:

- ✎ **Frontier Project** (underway): Described above. Summer 2020 activities include building up GOTV teams and supportive issue messaging.
- ✎ **Frontier next phase:** Based on the lessons learned from the Frontier Project in 2020, modifications to expand and scale up to other areas of the country.
- ✎ **Libertarian Elected Officials Network** (new): Nationwide support network for Libertarians in public office, to connect with each other, share ideas and achievements, be a sounding board, and generally support each other in their difficult roles.
- ✎ **Ballot Access Summit** (new): A roundtable that maps out ballot access strategy for 2022 and 2024 with key national and state LP participants, including legislative changes and litigation targets and developing ideas for generating public awareness of

the disparate treatment Ds and Rs give, with a goal of minimizing last minute (and expensive) “parachute drops” to secure ballot access.

- ✎ **Moulton Maneuver** (adopted nationally) for **Elected & Appointed Libertarians**: Pennsylvania elected 40 Libertarians in 2020, by systematically identifying all local races with no candidate, or vacant appointed positions, and matching them with a Libertarian willing to serve. While not all states have as many of these races as Pennsylvania, this project will work with state affiliates to identify them and expand our number of Libertarians gaining experience serving in local public office.
- ✎ **Campaign Trainings & Handbook** (expanded): Expanding our wildly successful programs training Libertarians on how to be effective candidates for public office and political directors for their state affiliate.
- ✎ **Vendor Network** (new): Directory of Libertarian vendors for campaign-related services.
- ✎ **Treasurer Trainings** (new): Providing “certifications” to those who undergo FEC training, building a bench of qualified treasurers to serve on campaigns.
- ✎ **Door Knocking Program** (expanded): Training a pool of experienced canvassers that can be deployed anywhere in the nation. Door knocking and lit drops, along with phone banking, remains our most effective campaign outreach technique.
- ✎ **Donation conduit website** (ambitious goal): ActBlue and WinRed are “conduit PACs” that are one-stop clearinghouses for donating to candidates on their “team” en masse. We lack an equivalent, resulting in balkanized digital fundraising that does not take advantage of economies of scale from donors interested in supporting multiple races. The value of such a website and how to implement it should be explored.

Potential Metrics (draft, subject to change):

- ✎ # state legislators elected
- ✎ # local officials elected
- ✎ Re-election rate as Libertarian
- ✎ # people who have door knocked & # doors knocked
- ✎ % of vote test races with Libertarian candidate
- ✎ % success rate in “vote test” races that preserve ballot access
- ✎ # people completing treasurer / campaign manager / strategy trainings
- ✎ # people completing media training
- ✎ % of candidates running sub-state legislature (local office) vs. state rep vs. Congress
- ✎ % of “winnable” local races with a Libertarian candidate
- ✎ % of Americans with at least one non-presidential Libertarian candidate on their ballot
- ✎ # of states with ballot access
- ✎ % votes for targeted races
- ✎ # in Elected Officials Support Network



Development

Goal: Build and sustain partnerships that provide the resources for our maximum impact.

Membership dues cover less than a quarter of the national party's expenses, with the remainder coming from general fundraising and project-specific fundraising. Only in 2016, however, did the party commit to adding a permanent dedicated fundraising staffer and only in 2019-20 has the LNC prioritized fundraising sufficiently to begin building a fundraising team.

We have a number of different avenues for people to contribute financially to the Party:

- ✎ \$25 basic memberships (set at that dollar level in the Bylaws; has been \$25 since 1991 aside from a short-lived increase to \$50 in 2004-05)
- ✎ Pledge memberships (monthly recurring gifts)
- ✎ Direct mail donations
- ✎ Digital solicitation donations
- ✎ Lifetime memberships (currently \$1,500, as set in the Policy Manual)
- ✎ Larger donations, up to the FEC cap, both general operating and project-specific
- ✎ Planned gifts (estate and legacy gifts)
- ✎ Sales of merchandise at the LP Store
- ✎ Sales of convention packages and other event tickets

Our financial supporters are long-term investors in our Party. For example, our most generous 100 current donors have been giving to the Party on average for 26 years, a total of \$4.2 million through our various giving avenues. Of the 857 people who have donated at least \$1,000 to the party in the last several years, the average first gift date is 2005. Our other supporters, though giving less in aggregate, similarly have long-lasting loyalty and give through a mix of our different giving avenues.

To build and sustain these life-long partnerships, we must carry out clear and systematic prospecting, asking, and stewardship strategies. Our prospecting will use generated leads, list trades, and research on issue segmenting and upgrade potential from existing donors to identify direct mail donors and major donor prospects (high giving potential and capacity), thereby minimizing cold calling. Our asking will be both pleasantly persistent in getting calls and meetings with our target prospects, and rely on compelling, authentic, memorable, and prepared pitches drawing on the donor's interests to sell the vision, mission, impact, and plans of what we do. Our stewardship must be thoughtful, interactive, and proactive, tailored as appropriate for the particular donor. The scope of stewardship will depend on gift size, but all donors should be thanked and feel engaged and appreciated.

Multiple people, including non-development staff, can and should participate in each step, but a development staffer will be given ultimate ownership over the qualification and stewardship steps. Bottleneck potential is thereby minimized in this "moves management" system. Prospector(s) are responsible for our number of new meetings and number of new donors

metrics. Asker(s) are responsible for our number of asks and number of update meetings metrics. Stewardship staff are responsible for our retention and average gift growth metrics. All together are responsible for total number of donors and total revenue raised metrics.

For direct mail and membership revenue in particular, we must carefully balance revenues, acquisition and house file costs, staff time, renewal rates, and upgrade initiatives. We should strive to meet or exceed industry averages of 1% acquisition response rate, 50% first-year renewal rates, and 70% subsequent year renewal rates.

Initiatives:

- ✎ **Issues Segmenting Information** (new): Methods of soliciting information about key issue interest areas from our members and donors, including on the membership form.
- ✎ **Open New FEC Accounts** (new): Determine balance of FEC reporting and giving options.
- ✎ **Prospecting Master List** (revamp): A system of generating leads and researching them for qualification for major gift asks.
- ✎ **Construct Asking Pipeline** (revamp): A system of calling and meeting, including travel costs, to request support that anticipates engagement of multiple askers.
- ✎ **Overhaul of Stewardship Strategy** (revamp): Defined checklist and schedule of touches for various giving levels. Assess existing stewardship products such as newsletters, and add new ones such as an Annual Pledge Pin, periodic stickers, and donor touches.
- ✎ **Direct Mail Strategy Assessment** (revamp): Periodic evaluation of direct mail strategy to ensure proper balance of revenues, costs, staff time, and renewal rates.
- ✎ **Digital Giving Strategy Assessment** (revamp): Refining our strategy and calendar for email and website solicitations, using target issues information.
- ✎ **Donor Event Strategy Assessment** (new): Developing a checklist and proactive strategy for donor events.
- ✎ **Create Party Strategic Plan and Prospectus Sheets for Major Projects** (expand): These marketing documents that recite our goals and metrics will assist in concise and accurate messaging about the priorities for which we are seeking financial support.

Potential Metrics (draft, subject to change):

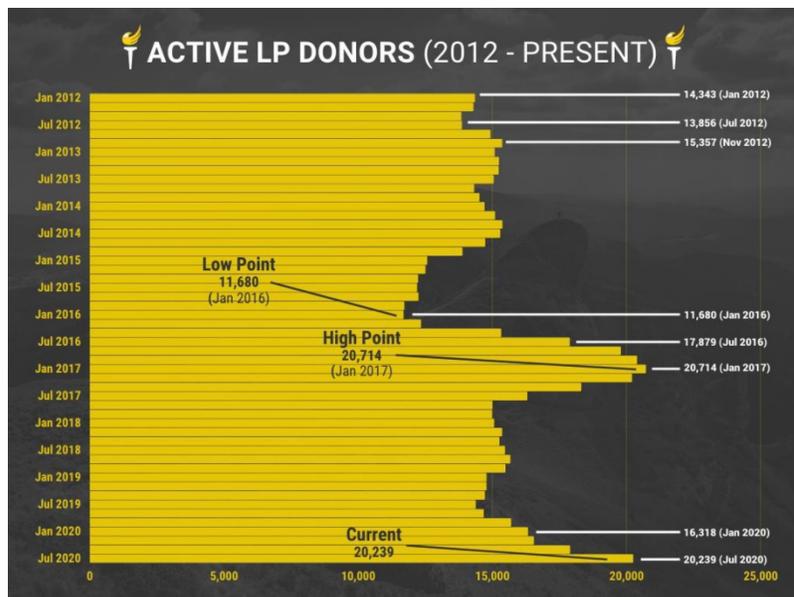
- ✎ \$ raised
- ✎ % renewal rate
- ✎ # and \$ from FEC max donors
- ✎ # and \$ from \$10,000 and up
- ✎ # and \$ from \$1,000 and up
- ✎ Direct mail revenue, acquisition costs, house file costs, staff time, and renewal rates
- ✎ % of stewardship/thank you to do list complete
- ✎ % of large donors who receive a monthly touch
- ✎ % of donors with affinity issue information
- ✎ \$ convention net revenue
- ✎ % of donors thanked within 48 hours
- ✎ % of LNC who are current donors

Activism & Membership

Goal: Support and engage a growing membership to achieve results.

Libertarian Party membership stands at just over 20,000 nationwide. This represents a recent high for membership in line with a clear four-year cycle surrounding the presidential election (see chart), but short of the all-time high 33,017 (December 1999). The membership number is a tiny fraction of the number of registered Libertarians (609,234 in 31 states + DC, double ten years ago), Libertarian votes for U.S. House (1.6 million in 2016, an all-time high), Libertarian votes for President in 2016 (4,489,341), or various estimates of the number of libertarians in the United States (between 23 million and 72 million, depending on survey wording).

Membership is not an end in itself. While the LP is built upon a paid membership, our activities must go beyond membership services to reaching non-member libertarians, persuading voters, and winning elections. New members include future donors, future candidates, future activists from all walks, and future party leaders, and our engagement with each must be differentiated. Those who choose to be activists should be provided with the tools and engagement opportunities that enable them to achieve impact.



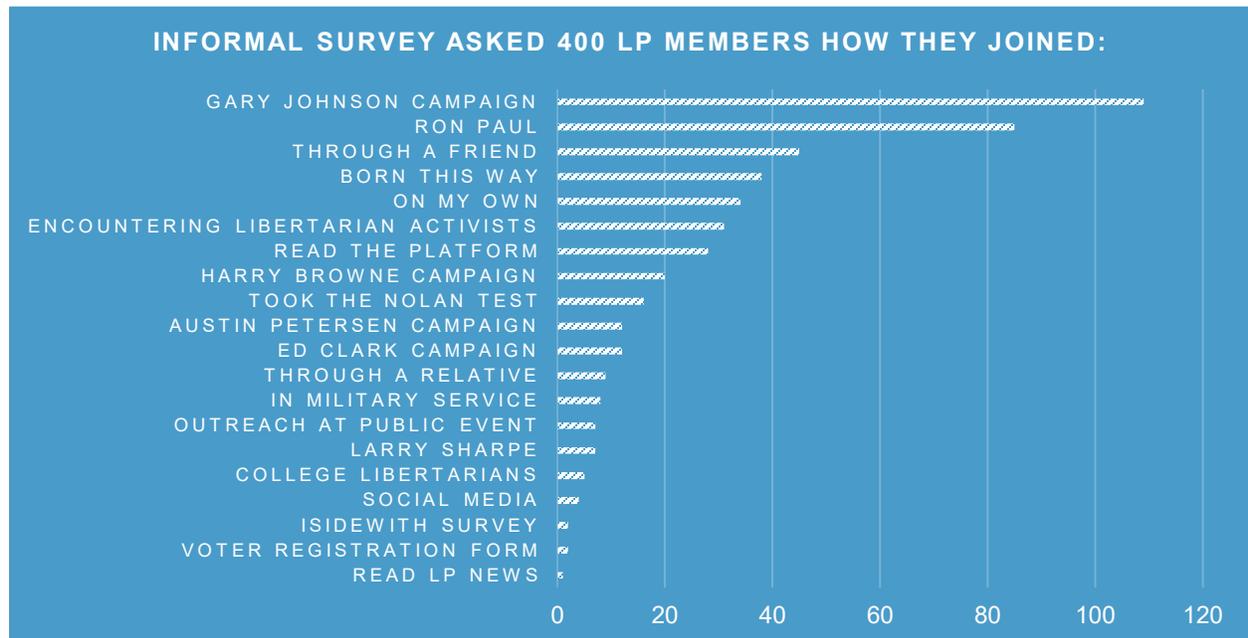
Initiatives:

- ✎ **Activist of the Month** (new): Celebrating an activist each month who had extraordinary impact, going above and beyond. Recognizes achievements at the grassroots level and encourages others to follow the lead.
- ✎ **Affiliate in a Box** (new): A ready-to-use kit of best practices and successful ideas for state and local Libertarian leaders, minimizing wheel-reinventing they must do.
- ✎ **Affinity Groups** (revamped): Surveying new and existing members for areas of focus or interest, to enable better targeting for coalitions, issue activities, and fundraising. Examples include **Libertarian Youth, Libertarian Moms & Dads, Libertarian Veterans, Libertarian Business Owners**, and specific policy issues.
- ✎ **Lobbying Days & Protest Days** (new): Tools to assist activists in organizing lobbying and protest days on key issues to draw attention and pressure policymakers, including coordinated national days of action (and participating in others' action days).
- ✎ **Membership Levels** (existing, revamp): Incentivize giving at more than the \$25 basic national membership level, such as with monthly pledge programs, benefits with higher

- giving levels, and voluntary agreements with states for combined membership.
- ✎ **Membership Referral Program** (existing, revamp): A minimal fee paid for referring new paid members above a certain level. Monitor net revenues and revamp as necessary.
- ✎ **Revisit Unified Membership Plan (UMP-III)** (new): From 1996 to 2005, the national and state parties had joint membership at the \$25 level; the program ended due to expense, fund transfer delays, and new FEC rulings. However, we should develop a new partnership for FEC-filing states, on a voluntary basis, to collect joint dues at a combined rate. Many new members are confused about why national and state membership aren't joint, with many joining one but not the other.
- ✎ **Stronger Affiliates** (existing, revamp): A package of optional training certifications and cooperative activities to boost affiliate capabilities for fundraising prospecting and stewardship, outreach and events (including convention best practices), candidate recruitment and development, political strategy and policy impact, media and PR, and administrative/IT.
- ✎ **Territorial Outreach** (new): Steps to establish affiliates in U.S. territories.
- ✎ **Volunteer Phone Banking** (new): A national pool of volunteers to supplement affiliate volunteer tasks, with innovative incentives to promote participation.

Potential Metrics (draft, subject to change):

- ✎ membership #s (total, new, renew, lapse, revenue, cost, net revenue)
- ✎ # at \$25 minimum level vs. other levels, including monthly pledge
- ✎ # turnout at national and state conventions
- ✎ # of months with Activist of the Month, # nominated, # of states with nominations
- ✎ # states FEC filing
- ✎ # states in joint membership with national and trends resulting
- ✎ # Lobby Day & Protest Day events
- ✎ # phone banking volunteers and # phone calls made, and impact on projects



Marketing & Media

Goal: Convey the LP as impactful and growing, the best option, and worthy of your support.

As he helped found the Libertarian Party in 1971, David Nolan wrote in *The Case For A Libertarian Political Party* that the party could enable seven things: (1) take advantage of free publicity afforded to candidates for public office to spread libertarian ideas to the public; (2) use the political process to identify new supporters and enlist them into the libertarian movement; (3) through vote totals, estimate the interest in libertarian ideas; (4) provide a permanent focal point for activists, as opposed to one-shot projects; (5) unite libertarians on the left and right of the political spectrum; (6) pressure politicians to adopt libertarian positions; and (7) elect Libertarians.

To this day, spreading libertarian ideas beyond our echo chamber, and building a Libertarian constituency, remains a key goal. Our candidates frequently have opportunities to speak with new audiences about our principles, platform, and policy positions. Many Americans are unhappy with the choices offered by the two other parties, and this opportunity gives our candidates the ability to connect with them on our innovative ideas and our values of personal empowerment, rights, freedom, innovation, privacy, justice, peace, persuasion, voluntary cooperation, and competition, and talk with them (not at them) about our answers to the major public policy issues of the day that affect them.

Our marketing efforts face the challenge of countering the narrative framed by our opponents: essentially, that Libertarians are not empathetic, not in line with where Americans want to go, and not capable of winning. We also face tribalism and partisanship, media not disposed to cover us, and sufficient resources in a competitive and noisy environment. We must be highly innovative and strategic to be heard. To do this, we should aim to reach people we don't traditionally reach, with messages framed on positive forward thinking, connecting with individuals on their terms, and finding common ground as a first step to persuasion.

The best way for us to do this is by embracing the decentralized nature of our party, and relying on our candidates, affiliates, and activists to speak to audiences in ways they know best. The national party has a role in identifying media opportunities and providing talking points that can be used, developing relationships with editors and producers and connecting them with our spokespeople, and providing training and general libertarian promotion. The ROI of our marketing efforts may be difficult to measure, but we must monitor the effectiveness however we can and use that data to reinforce success where we find it.

Initiatives:

- ✎ **Media Training** (new): Providing "certifications" to those who undergo specially provided training to be persuasive spokespeople.
- ✎ **Coalitions Strategy** (revamp): Evaluating our current methods of connecting with organizations in the broader libertarian movement, to improve communication,

possibility of joint endeavors, and effectiveness.

- ✎ **LP Newsletters Strategy (LP News, Pledge Newsletter, Lifetime Newsletter, Chair's Newsletter)** (revamp): Evaluate the benefits and costs of our various regular print publications, making improvements or changes as necessary to maximize impact.
- ✎ **LP Store Assessment** (revamp): Actions to combine items people want, items that raise money, and items that boost LP brand, while balancing staff and financial costs
- ✎ **LPTV/Video Assessment** (revamp): Evaluate the benefits and costs of our various video enterprises, making improvements or changes as necessary to maximize impact.
- ✎ **Social Media Strategy** (revamp): Define audience/goals of our social media footprint.
- ✎ **Marketing Materials on Issues** (revamp): Talking points, up-to-date information, and examples on key topics made available for candidates for their campaign issues.
- ✎ **LP General Promotion/Branding** (revamp): Promotion of platform planks and related messaging, including op-eds or press releases, designed to result in earned media, supplemented if possible by strategic ad buys. Graphics should use common branding.
- ✎ **Small Business Initiative** (re-launch): Messaging targeted at the small business community to boost fundraising, membership, and votes from a natural constituency.
- ✎ **Staffing/Contractor Assessment** (revamp): Constructing a staff structure.

Potential Metrics (draft, subject to change):

- ✎ # mentions in papers of records (with analysis of how we are framed)
- ✎ # of press releases produced, % picked up
- ✎ # who receive media training
- ✎ # media placements/mentions (print, TV, radio) (with analysis of local vs national)
- ✎ # issue or messaging briefs produced
- ✎ % social media growth (views/likes/friends)
- ✎ % of marquee candidates who get national media attention
- ✎ LP Store ROI (sales, "profit")
- ✎ \$ raised from mailing of publications/newsletters
- ✎ Awareness/impression survey data and other measurables on marketing initiatives



Budget & Operations

Goal: Deliver infrastructure and operating practices that seamlessly support our activities.

The national Libertarian Party has in the past decade built up a professional staff to lead critical functions, shifting away from an all-volunteer model. This transition, while vital, has led to growing pains as our growth outstripped some of our infrastructure and practices. In addition to evaluating our current practices for optimization, we can also work towards a staff structure and set of policies that anticipate future needs, salaries and benefits that allow us to recruit and retain our best, and automating or contracting out functions where it makes sense. The prudent financial management of the 2018-20 LNC, which closed a six-digit structural budget gap, should continue along with matching costs of new initiatives with donor support.

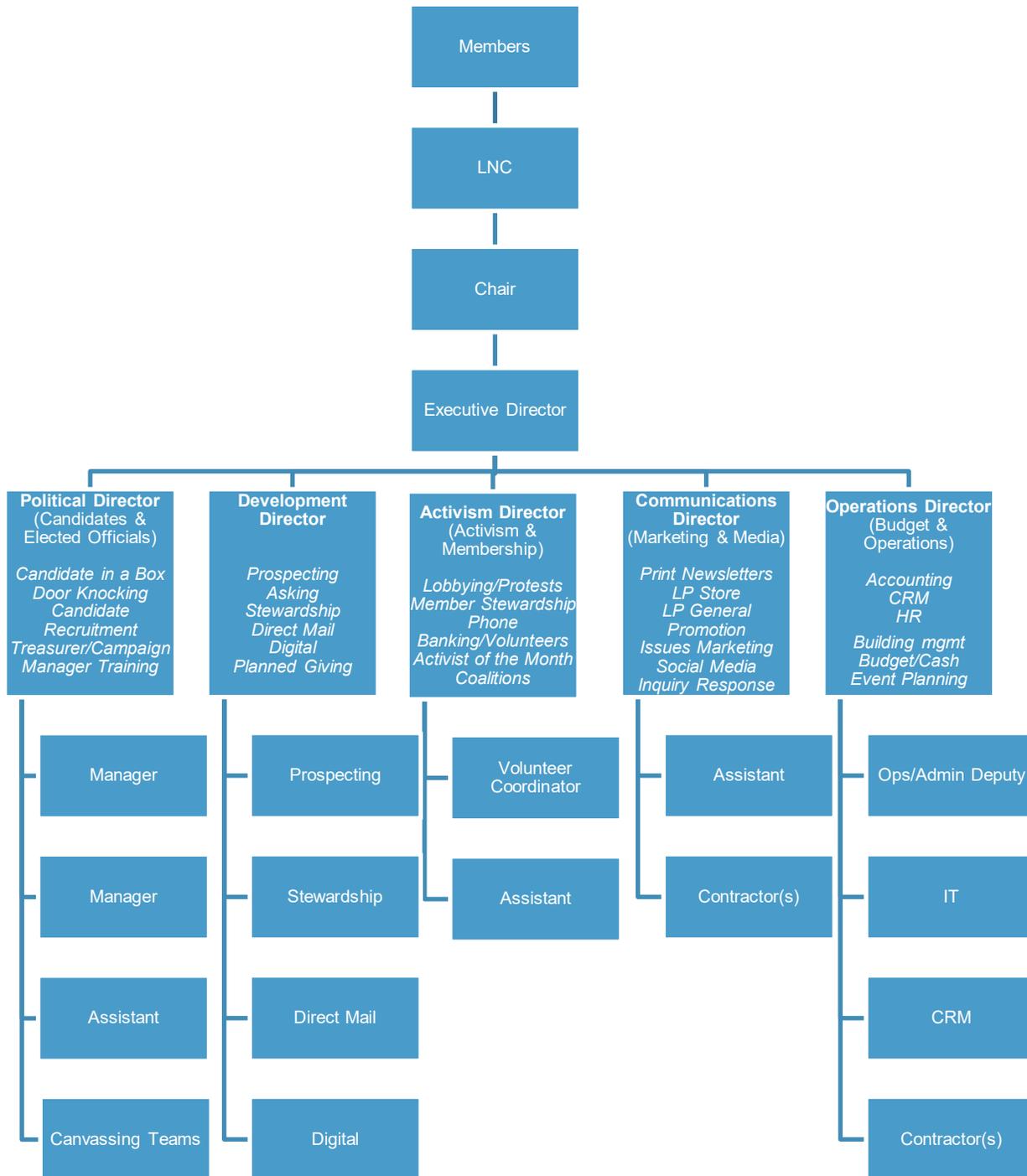
Initiatives:

- ✎ **Strategic Planning Process & Staff Optimization** (new): A comprehensive process to establish roles, responsibilities, and expectations including measurable goals; a new organizational chart with clear lines of authority and decision rights; and exploring salary and benefits revamp.
- ✎ **Information Technology** (revamp): Move IT from committee of volunteers to coordinator or contractor, including providing a clearinghouse for volunteers to help. Pursue off-the-shelf technology where advisable.
- ✎ **Clear CRM Backlog** (ongoing): Numerous states have been seeking to join National HQ's donor database management system, and clearing this backlog should be a top goal. Additional features to the CRM should be carefully planned out and executed within budgeted costs and timeframes.
- ✎ **HR Best Practices** (new): Address concerns about respectful conduct and lack of diversity through training and other best practices as recommended by a task force.
- ✎ **LNC Standing Committees** (new): Establish standing committees to shift workshopping from the full LNC to those committees, while also creating institutional champions for top priorities and engaging all LNC members in the work of the organization.
- ✎ **Building Needs Assessment** (ongoing): Determine needs for space and capabilities.

Potential Metrics (draft, subject to change):

- ✎ Financial metrics (assets, liabilities, net assets, revenues, expenses, net revenues, cash flow by month)
- ✎ Cash flow and budget envision adequate reserve
- ✎ # of days current on 30+ days liabilities
- ✎ # of states on CRM onboarding backlog
- ✎ # of open IT tickets, and days listed for each item
- ✎ % staff turnover (unwanted departures)
- ✎ # individuals trained on FEC compliance
- ✎ Percentile for salaries and benefits compared to peer positions
- ✎ # unplanned downtime for key IT infrastructure

Targeted Organization Chart



“After you’ve done a thing the same way for two years, look it over carefully.

“After five years, look at it with suspicion.

“And after ten years, throw it all away and start over.”

-Al Perlman, 20th Century Railroad Executive