

SPECIAL MEETING MINUTES  
LIBERTARIAN NATIONAL COMMITTEE  
JULY 2, 2023  
VIA ZOOM



PREPARED BY **CARYN ANN HARLOS**, LNC SECRETARY

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**LEGEND:** *text to be inserted*, ~~text to be deleted~~, unchanged existing text, *substantive final main motions*.

All main substantive motions will be set off by *bold and italics in green font* (with related subsidiary and incidental motions *set off by highlighted italics*) and will be assigned a motion number comprising the date and a sequential number to be recorded in the Secretary's Main Motion/Ballot Tally record located at <https://tinyurl.com/LNCVotes2023>

Points of Order and substantive objections will be indicated in **BOLD RED TEXT**.

All vote results, challenges, and rulings will be set off by **BOLD ITALICS**.

The Secretary produces an electronic One Note notebook for each meeting that contains all reports submitted as well as supplementary information. The notebook for this meeting can be found at <https://tinyurl.com/July2023LNC>

The LPedia article for this meeting can be found at:  
[https://lpedia.org/wiki/LNC\\_Meeting\\_2\\_July\\_2023](https://lpedia.org/wiki/LNC_Meeting_2_July_2023)

Recordings for this meeting can be found at the LPedia link.

The QR codes lead to the video portion of the meeting being discussed.

## OPENING CEREMONY

### CALL TO ORDER AND OPPORTUNITY FOR PUBLIC COMMENT

Chair Angela McArdle called the meeting to order at 7:05 p.m. (all times Eastern).

## HOUSEKEEPING

### ATTENDANCE

The following were in attendance:

**Officers:** Angela McArdle (Chair), Andrew Watkins (Vice-Chair), Caryn Ann Harlos (Secretary), Todd Hagopian (Treasurer)

**At-Large Representatives:** Dustin Blankenship, Rich Bowen, Steven Nekhaila, Kathy Yeniscavich

**Regional Representatives:** Miguel Duque (Region 1), Dave Benner (Region 2), Dustin Nanna (Region 3), Adrian F Malagon (Region 4), Otto Dassing (Region 5), Linnea Gabbard (Region 7), Pat Ford (Region 8)

**Regional Alternates:** Becky Jones (Region 1), Martin Cowen (Region 2), Greg Hertzsch (Region 3), Will Hyman (Region 5), Bill Redpath (Region 6), Donovan Pantke (Region 7)

**Absent:** Joshua Clark (Region 4 Representative), Robley Hall (Region 8 Alternate), Mike Rufo (At-Large Representative), Mark Tuniewicz (Region 6 Representative)

**Staff:** Lainie Huston (Executive Director), Andy Buchkovich (CTO)

The gallery contained many attendees as noted in the Registration Roster attached hereto as **Appendix A** comprising person who registered in advance, though not all of the registrants attended.

### OPPORTUNITY FOR PUBLIC COMMENT

The following persons spoke during public comment:

- TJ Kosin - Pennsylvania
- Rob Cowburn -Pennsylvania (Chair)
- Stephen Ecker - Wisconsin (Chair)
- Hannah Goodman - Colorado (Chair)

## PURPOSE OF SPECIAL MEETING

The Chair previously submitted a proposed agenda as follows:

<b>Opening Ceremony</b>			
	Call to Order		7:00 p.m.
	Attendance		5 Minutes
	Opportunity for Public Comment (2 minutes each)		10 Minutes
<b>New Business with Previous Notice</b>			
1.	Announcement of Applications for Platform and Credentials Committees	Harlos	Negligible
2.	Ballot Access Committee Update	Nanna	10 Minutes
3.	Convention Oversight Committee Update	Bowen	15 Minutes
4.	Financials and Additional Goal Setting	McArdle	20 Minutes
5.	Update on Memberships from Staff	Yeniscavich	10 Minutes
6.	APRC Membership	McArdle	10 Minutes
7.	Policy Manual Amendment (portions of debate, if any, may be in Executive Session)	Harlos	15 Minutes
8.	Potential Sale/Relocation of LPHQ	Malagon	20 Minutes
9.	Visit to LPHQ during DC Meeting	Malagon	5 Minutes
10.	Civi/Budget Proviso Recission	Duque	20 Minutes
11.	Civi Report	McArdle	20 Minutes
<b>Closing Ceremony</b>			
	Announcements and Adjournment		9:00 p.m.

**NEW BUSINESS WITH PREVIOUS NOTICE**

**PLATFORM AND CREDENTIALS COMMITTEE APPLICATIONS**

Secretary Harlos gave an update on the timeframe for these and who is entitled to appointment.

**BALLOT ACCESS COMMITTEE**

Ballot Access Committee Chair Dustin Nanna provided an update. He fielded questions and comments.

**CONVENTION OVERSIGHT COMMITTEE**

Convention Oversight Committee Chair Rich Bowen provided an update. He fielded questions and comments.

**WITHOUT OBJECTION**, the agenda item for financials and goals setting was moved to the end of the meeting as it would need to happen in executive session.

## UPDATE ON MEMBERSHIP FROM STAFF

Ms. Yeniscavich spoke to her request. Executive Director Lainie Huston gave additional information. Secretary Harlos spoke about delegate allocations. Ms. Huston fielded questions and answers.

## POLICY MANUAL AMENDMENT

*Secretary Harlos moved the following amendment to Policy Manual Section 2.09:*

### *5) Permissible use of Trademarks*

*The following are permitted to use the Party trademarks:*

- a. The Party and any recognized state-level affiliate and their properly chartered sub-affiliates.*
- b. Any other organization or group, that does not function as a party nor hold themselves out as a party, but identify as part of the Libertarian Party, such as caucuses or social groups formed in support of the Libertarian Party, provided the following:*
  - 1. Their leadership are members of a state Party and/or the national Party and their goals include supporting and recruiting members into the Party at a state and/or national level.*
  - 2. They take no stance contrary to the Party's Statement of Principles;*
  - 3. They only endorse or fund candidates in partisan races that are members of a state Party and/or the national Party and are not members of any other Party;*
  - 4. They do not function as, or hold themselves out as, or register with any entity or election board as, a political party.*

*For any entity other than the recognized state-level affiliate and their properly chartered sub-affiliates, the LNC may revoke this permission, for failure to follow any of the above guidelines or conducting themselves in a manner harmful to the image of the Party.*

**WITHOUT OBJECTION, Mr. Bowen moved to end debate.**

A roll call vote was conducted with the following results:

<b>Member / Alternate</b>	<b>Yes</b>	<b>No</b>	<b>Abstain</b>
Benner/Cowen	X		
Blankenship	X		
Bowen	X		
Dassing/Hyman	X		
Duque/Jones			X
Ford/Hall	X		

Member / Alternate	Yes	No	Abstain
Gabbard/Pantke	X		
Hagopian	X		
Harlos	X		
Malagon/Clark	X		
Nanna/Hertzsch	X		
Nekhaila	X		
Tuniewicz/Redpath			X
Watkins	X		
Yeniscavich	X		
McArdle			X
<b>TOTALS</b>	<b>13</b>	<b>0</b>	<b>3</b>

*This motion PASSED with a roll call vote of 13-0-3. [20230702-01]*

#### POTENTIAL SALE/RELOCATION OF LPHQ

Mr. Malagon led a discussion on this issue.

#### VISIT TO LPHQ DURING DC MEETING

Mr. Malagon led a discussion on this issue.

#### CIVICRM REPORT

Ms. Huston and CTO Andy Buchovich were given time to discuss this issue. A copy of the evaluation report is attached hereto as Exhibit "B." They fielded questions and answers.

#### CIVI BUDGET PROVISIO RESCISSION

There was discussion as to whether this agenda item was properly noticed. After discussion, it was allowed to proceed.

*Mr. Duque moved to rescind a motion previously adopted, #20221211-09 (which added a proviso to LNC budget line 8240 Computer Services \$80,000.00 reading "This budget line is intended for services to support CiviCRM"), overturning the motion and removing the proviso.*

Chair McArdle passed the gavel to Vice-Chair Watkins.

*Secretary Harlos moved to postpone this agenda item to the LNC's August in-person meeting.*

**WITHOUT OBJECTION**, Mr. Malagon moved to end debate.

A roll call vote was conducted with the following results:



Member / Alternate	Yes	No	Abstain
Benner/Cowen	X		
Blankenship			X
Bowen	X		
Dassing/Hyman	X		
Duque/Jones		X	
Ford/Hall	X		
Gabbard/Pantke	X		
Hagopian	X		
Harlos	X		
Malagon/Clark		X	
Nanna/Hertzsch	X		
Nekhaila	X		
Tuniewicz/Redpath	X		
Watkins			X
Yeniscavich	X		
McArdle			X
<b>TOTALS</b>	<b>11</b>	<b>2</b>	<b>3</b>

This motion **PASSED** with a roll call vote of 11-2-3.

### EXECUTIVE SESSION



Mr. Malagon moved to go into Executive Session to discuss financials and goals setting with the Executive Director present.

A roll call vote was conducted with the following results:

Member / Alternate	Yes	No	Abstain
Benner/Cowen	X		
Blankenship		X	
Bowen	X		
Dassing/Hyman	X		
Duque/Jones		X	
Ford/Hall	X		
Gabbard/Pantke			X
Hagopian	X		
Harlos	X		
Malagon/Clark	X		
Nanna/Hertzsch	X		
Nekhaila	X		
Tuniewicz/Redpath			X
Watkins	X		
Yeniscavich	X		
McArdle			X



<b>Member / Alternate</b>	<b>Yes</b>	<b>No</b>	<b>Abstain</b>
<b>TOTALS</b>	<b>11</b>	<b>2</b>	<b>3</b>

This motion **PASSED** with a roll call vote of 11-2-3.

**WITHOUT OBJECTION**, Secretary Harlos moved to extend time by thirty (30) minutes.

The LNC went into Executive Session at 9:05 p.m. after standing at east for five (5) minutes with the Executive Director present for purposes of staff issues and political strategy. The LNC rose out of Executive Session at 10:11 p.m.

### **ADJOURNMENT**

The LNC adjourned for the day **WITHOUT OBJECTION** at 10:12 p.m.

### **TABLE OF NUMBERED MOTIONS/BALLOTS**

\*Note that the master log of motions in 2023 can be found here: <https://tinyurl.com/LNCVotes2023>

<b>ID#</b>	<b>Motion/Ballot</b>	<b>Result</b>
<b>20230702-01</b>	Policy Manual Amendment to Section 2.09	<b>PASSED</b>

### **TABLE OF APPENDICES**

<b>Appendix</b>	<b>Title</b>	<b>Author</b>
<b>A</b>	Log of Registrants	Zoom
<b>B</b>	CiviCRM report	Skvare

Respectfully submitted,

A handwritten signature in red ink that reads "Caryn Ann Hauke". The signature is written in a cursive, flowing style.

**LNC Secretary ~ Secretary@LP.org ~ 561.523.2250**

APPENDIX A – LOG OF REGISTRANTS

REGISTRANTS SHEET<sup>1</sup>

<b><u>NAME</u></b>
Sylvia Arrowwood
Travis Bost
Zachary Burgeson
Greg Burton
Stephen Ecker
Jessica Glover
Hannah Goodman
Tim Hagan
Ben Harrison
Susan Hogarth
Ryan Hudson
Jay Hunter
Jonathan M. Jacobs
Anna Duque Johnson
TJ Kosin
John L
Ross M
Ken Mattes
Ken Moellman
Christopher Olenski
George Phillies
Donald Rainwater
Nathan Romig
Alfa Shaw
Larry Silver
Daniel Spears
Enzo Warren
Robert Yeckley

<sup>1</sup> The Zoom link required registration. This list comprises all persons who registered (with the exception of LNC members, staff, and other national Party representatives) but not everyone necessarily attended.

APPENDIX B – CIVICRM REPORT

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## CiviCRM Infrastructure Assessment Report

Prepared for the Libertarian Party | May 2023

### Table of Contents

#### **Technical Recommendations: Server and Infrastructure**

- Apache Web Server
- PHP
- MySQL
- Structure

#### **Technical Recommendations: General**

- Internal CiviCRM search and reporting
- End User Support and Documentation
- Simplify and Streamline Technical Tools
- Create a Reference Instance
- Create Developer Documentation
- Remove Unnecessary Add-Ons
- Convert CiviRules to Custom Code
- Optimize Smart Groups and ACLs
- Cache

#### **Technical Recommendations: User Permissions**

- Conceptual Overview: User Permissions, Multisite and ACLs
- WordPress and CiviCRM Multisite
- Additional Permissions Features and Settings
- WordPress User Roles via User Role Editor
- CiviCRM: WordPress Access Control
- CiviCRM ACLs
- CiviCRM Groups
- WordPress Groups and Related Plugins
- CiviCRM Extension: Contact Summary Editor
- CiviCRM Extension: Custom CiviCRM Permissions
- CiviCRM Custom Extensions

## Technical Recommendations: Server and Infrastructure

Skvare has conducted a review of the WordPress+CiviCRM system's server and infrastructure.

### Apache Web Server

The following performance-related settings currently use default values. Our recommendation is to consider increasing these settings, which can yield performance improvements. Note that setting any of these too high may lead to resource exhaustion.

- MaxClients: controls maximum simultaneous connections that Apache will allow.
- Enable KeepAlive (done); adjust KeepAlive timeout and MaxKeepAliveRequests. Allows multiple requests to be sent over a single TCP connection; sets the maximum number of requests that can be sent over a single TCP connection when KeepAlive is enabled.
- Timeout: sets the amount of time that Apache will wait for a response from a client before closing the connection.
- ServerLimit: sets the maximum number of worker processes that Apache will create.
- ThreadLimit: sets the maximum number of worker threads per process.
- StartServers: sets the number of worker processes that Apache will start initially.
- MinSpareThreads and MaxSpareThreads: minimum and maximum number of idle worker threads that Apache will keep running.
- ListenBacklog: sets the maximum length of the queue of pending connections.
- Enable EnableMMAP and EnableSendfile: These variables control whether Apache will use memory-mapped files and the sendfile() system call for sending files, respectively. Enabling them can improve performance.

### PHP

- Set opcache.enable to 1 to enable opcode caching for PHP files.
- Increase opcache.memory\_consumption to 512MB to allow for more scripts to be cached in memory.
- Set opcache.max\_accelerated\_files to a higher value, such as 10000, to cache more PHP files.
- Increase memory\_limit to a higher value, such as 8192M, to allow PHP scripts to use more memory.
- Set max\_execution\_time to a higher value, such as 600, to allow PHP scripts to run longer before timing out.
- Increase post\_max\_size to a higher value, such as 128M, to allow for larger file uploads.
- Increase upload\_max\_filesize to a higher value, such as 128M, to allow for larger file uploads.

- Set `realpath_cache_size` to a higher value, such as 4096K, to cache more file paths in memory for faster file access.
- Set `realpath_cache_ttl` to a higher value, such as 86400, to cache file paths in memory for longer periods of time.

### MySQL

- `innodb_buffer_pool_size`: Consider increasing this value from its current setting of 96GB to 120GB or higher to allow MySQL to use more memory for caching data.
- `innodb_log_file_size`: This setting is already fairly large at 4GB, but increasing it could improve write performance. However, it may also increase recovery time in the event of a crash. Try 8GB or 16GB and monitor the impact on performance.
- `innodb_flush_log_at_trx_commit`: This setting determines how often MySQL writes transaction logs to disk. The default value of 1 provides maximum durability, but it can also impact write performance. Try setting it to 2 or 0 to see if it improves performance without sacrificing data integrity.
- `tmp_table_size` and `max_heap_table_size`: These settings control the maximum size of temporary tables used by MySQL. Increasing them could improve performance, but be careful not to set them too high or you could risk running out of memory.
- `query_cache_size`: Enabling the query cache might improve performance for read-heavy workloads. Currently set to 0, consider setting it to a higher value.
- `join_buffer_size`: Currently set to 4GB, this value can be reduced to 4M or 8M which is enough to handle most joins.
- Consider upgrading the version of MariaDB on the database server. The current version is 10.6.12, which has long-term support, but it will expire in three years. Upgrading to a newer version can improve performance.

### Structure

- Database Replication: Set up database replication to create a secondary database server for redundancy and failover.
- Content Delivery Network (CDN): Use a CDN to cache and serve static assets like images, videos, and other files. This will reduce the load on the web servers and improve the application's performance.
- Cache: Use a caching mechanism like Memcached or Redis to cache frequently accessed data. This will help in reducing the load on the database server and improve the application's performance.
- Monitoring: Use a monitoring solution like Prometheus or Zabbix to monitor the infrastructure and application health. This will help in identifying and resolving issues before they impact the users.
- Load Balancer: Use a load balancer to distribute traffic across multiple web servers. This will help in distributing the load and provide high availability.

## Technical Recommendations: General

Skvare is providing the following set of tactical recommendations, based on our review of the WordPress+CiviCRM system and discussions with the Libertarian Party team. These recommendations can be implemented in the short term, some of them immediately.

### Internal CiviCRM search and reporting

Some national party and state users report using CiviCRM's Search Kit and Search Builder features for standard search and reporting. Skvare's recommendation is that these search features be hidden and/or discouraged for most users. Instead, direct them to Basic Search and Advanced Search by modifying the CiviCRM navigation menu. *This menu has already been modified to place Basic and Advanced searches under the "Legacy Search" heading. We recommend reverting that change.*

From [CiviCRM's Search Kit documentation](#):

SearchKit is a powerful search query builder with extensive options for displaying results. *It is appropriate for site builders, power users and developers but non-technical staff are likely to need training or to spend some time learning the interface.* Alternatively, a more experienced user or developer may create SearchKit searches and make them available to other users via the menu system or as a dashlet on the main CiviCRM screen.

**When to implement:** right now, unless it's preferable to announce this change to affiliate users in advance. In that case we recommend you schedule this change for a date of your choice and make the announcement now.

### End User Support and Documentation

Although this assessment did not include a review of the external help and support site, [helpdesk.lp.org/wiki](https://helpdesk.lp.org/wiki), we did observe that it is a separate site which requires its own separate login. Without knowing the reasons it was set up this way, we recommend considering a migration of that content to the WordPress site. There are a variety of options for configuring a subset of WordPress site content so it's visible only to authorized users.

### Simplify and Streamline Technical Tools

Based on our system review, we think it is very likely that speed and performance issues are caused by the complexity of WordPress+CiviCRM configuration. In this section we outline a recommended approach for simplifying and streamlining.



### Create a Reference Instance

We recommend **creating a “vanilla” WordPress + CiviCRM instance** for the technical team to use for diagnostic and development purposes. This would be in addition to dev instances which more closely match the production system.

A “vanilla” instance will support the creation of developer documentation (next step). It will also facilitate minor changes like the search menu changes recommended above (**Internal CiviCRM Search and Reporting**) by enabling you to easily see what CiviCRM’s unmodified search menu looks like.

At Skvare we maintain several such instances for internal use. When investigating an issue, one common question that arises is “is this [system behavior] normal?” It’s valuable to check against a “clean” install and immediately know whether you’re troubleshooting something specific to your site vs a standard behavior.

### Create Developer Documentation

This recommendation will come as no surprise to the Libertarian Party’s technical team.

We recommend documenting the site’s WordPress plugins, CiviCRM extensions, and custom code. A simple list of plugins and extensions will not be very useful; it’s far more important to document what each one does and where in the system this behavior can be observed.

Fortunately, the site’s custom code is not very extensive at all, and quite limited in its functionality.

### Remove Unnecessary Add-Ons

Some WordPress plugins and CiviCRM extensions can have significant impacts on performance. The Libertarian Party’s system has a notably high number of both.

**Recommendation:** uninstall plugins and extensions which may be negatively affecting performance.

Clearly this process will require caution! Once the purpose and behavior of each plugin and extension is documented (**Developer Documentation**, above) you can begin to analyze whether that behavior is needed. Before removing a plugin or extension, verify that it is not required by another plugin or extension, or by custom code.

Some extensions which are likely contributing to performance issues:

- Activity Type ACL
- Access Control by Financial Type for Reports: causes significant performance degradation on some large sites.

- Custom CiviCRM Permissions (see **User Permissions** section for recommendations on this extension)

Some extensions are improving performance and should be left installed and enabled, such as:

- INNODB triggers
- CSS/JS aggregator

### **Convert CiviRules to Custom Code**

We have never seen so many CiviRules in one site. Many of them control adding contacts to CiviCRM Groups: state-specific groups, email lists, etc. It looks like hundreds of rules may be firing in response to simple actions such as adding or editing a contact.

The reason contacts need to be added to these groups is clear. CiviCRM's multisite and ACL-based permissions – the permissions which control which affiliate users can see which contacts – rely on CiviCRM groups. They do not work with Smart Groups; the groups must be Basic. Therefore, some process is necessary to add contacts to, say, the Alaska state party group if that contact is in Alaska.

An experienced CiviCRM developer should move this functionality to a custom CiviCRM extension.

- Instead of hundreds of separate rules firing at all times, contact add/edit will trigger one process which handles all the logic of multiple states and any other group membership required.
- For enhanced accuracy, an additional cleanup process may be developed as a Scheduled Job which would run overnight. It would check for group changes that should have happened but failed for any reason.

Additionally, it looks like the current collection of CiviRules do not fully handle group changes or removals: they add a contact to a group when an address is added, but appear not to include a mechanism to remove a contact from a group when its address is deleted or changed. (Due to the sheer quantity of rules, it is quite possible this behavior does exist and we just didn't spot it.)

### **Optimize Smart Groups and ACLs**

See the full set of recommendations here:

<https://docs.civicrm.org/sysadmin/en/latest/setup/optimizations/>

Basically, all of these recommendations are relevant for the Libertarian Party. They have been implemented at some point in the past, as evidenced by these (good, and appropriate for this system) settings in civicrm.settings.php:

```
$civicrm_setting['CiviCRM Preferences']['smart_group_cache_refresh_mode'] =  
'deterministic';  
$civicrm_setting['CiviCRM Preferences']['acl_cache_refresh_mode'] = 'deterministic';
```

Most of the settings described in the above-linked documentation have different effects depending on the site and its activity level, whether and how various CiviCRM features are used, and the values of other related settings. We recommend reviewing them again now.

If possible, decrease the frequency of the Flush Group Cache scheduled job in CiviCRM. It is currently set to (Always).

## **Cache**

The current settings for the CiviCRM “Clean-up Temporary Data and Files” job are good: database cache is retained until manually cleared.

We recommend enabling Memcache or Redis to improve performance.

## **Technical Recommendations: User Permissions**

Granting additional permissions to various user types, which the party has reported is one of its short-term goals, is fundamentally a business decision. The risk is that increased permissions will require additional training and support, and introduce a greater risk of incorrect setup or inaccurate data.

From the technical side, the current challenge in changing permissions is that they are managed in a lot of different places. This section summarizes where and how permissions are controlled, and provides recommendations for simplifying.

### **Conceptual Overview: User Permissions, Multisite and ACLs**

- Multi-site / ACLs - based on CiviCRM Groups - controls who you can see\*
- User roles & permissions - based on WordPress user roles - controls what you can do\*

*\*There are exceptions. This is a generalization.*

Additional access rules and permissions are used to define contact summary layout, menu items, and other UI elements.

## WordPress and CiviCRM Multisite

WordPress and CiviCRM domains are based on domain groups. The relevant CiviCRM Groups are flagged as Reserved (good) and named “[STATE ABBREV] State.”

A system of CiviRule actions adds contacts to the appropriate group. See **Convert CiviRules to Custom Code**, above, for an important recommendation on simplifying this process.

Because multisite CRM behavior requires constant checking of which users can see which contacts, this setup itself can be fairly resource intensive. See **Optimize Smart Groups and ACLs** above for recommendations on optimization. Multisite relies on ACL functionality, so the ACL recommendations apply.

## Additional Permissions Features and Settings

### WordPress User Roles via User Role Editor

In WordPress, a small set of non-standard user roles is created via the User Role Editor plugin. These roles are: Administrator, Anonymous, Contributor, Editor, State Admin, Subscriber, Volunteer. Given our understanding of the system, this seems entirely appropriate. Both WordPress and CiviCRM permissions are [controlled via this plugin](#).

### CiviCRM: WordPress Access Control

[WordPress Access Control](#) permissions are configured within CiviCRM > Users and Permissions. There is significant overlap between these settings and the ones controlled by the WordPress User Role Editor plugin (above), with the WordPress plugin evidently superseding these settings.

**Recommendation:** there is certainly no need for this comprehensive list of permissions to be managed in two places, but this one is native CiviCRM, and the WordPress version comes with the ability to have user roles such as “State Admin.” Conduct a round of testing on a dev instance to confirm that the WordPress plugin’s settings do in fact take precedence, and then make a note in the developer documentation to ignore this CiviCRM settings page going forward.

If testing on a dev instance reveals more complexity – such as the need for a permission to be turned on in both places in order to be active in practice – then decide which will be the authoritative source of permissions. Set all permissions in the other to all-on or all-off, as needed such that the authoritative version works as expected.

### CiviCRM ACLs

[CiviCRM ACLs](#) are in use in addition to parallel multisite permissions. These appear to layer on top of multisite domains and the contacts accessible there, with ACL regions each covering multiple states.

**Recommendation:** Upon review, it appears there are very few users in the ACL user groups. Are these critical to maintain? Can this handful of regional users be safely granted wider system access instead? Removing this additional layer of visibility-type permissions may improve performance.

### CiviCRM Groups

In the system [CiviCRM Groups](#) are used for (among other things): Domains, ACLs, and WordPress Group Sync.

**Recommendation:** review all CiviCRM groups flagged as “domain access”; delete unused ones.

### WordPress Groups and Related Plugins

There are 28 [WordPress Groups](#) including Candidate Advanced, Candidate Basic, Super State Admin, Super Staff Admin. WordPress groups are [synced with CiviCRM groups](#) via the [CiviCRM Groups Sync](#) extension. (Adding a contact to a CiviCRM group grants a set of permissions. Effects appear in WordPress menus, CiviCRM contact summary screen, etc.)

The same extensive set of permissions which can be controlled via the WordPress User Role extension and CiviCRM’s WordPress Access Control settings are also controlled here.

**Recommendation: Prioritize this feature for removal.** Perform a detailed review of the functionality it currently provides. Determine which functionality is necessary to maintain and which can be discontinued. Transition necessary functionality to other WordPress and CiviCRM features.

### CiviCRM Extension: Contact Summary Editor

The [Contact Summary Editor extension](#) allows different CiviCRM users to see different versions of the contact summary screen (the main screen in CiviCRM when you’re looking at a contact record). It relies on CiviCRM Groups.

This feature represents a deviation from the rule that *groups control who you can see; roles control what you can do*. Contact layouts have been modified based on user role (State Admin, Development, etc.) which is a logical use for this feature, but these are definitely user roles which in this case are defined as CiviCRM Groups.

**Recommendation:** review and simplify this configuration. There are a number of competing/inactive layouts saved in the system. For example, since the Development layout follows the Administrator layout (in the list which corresponds to their rank/priority), and Development is being shown to no users that *aren't* included in Administrator, the Development layout will never be shown.

By themselves these conflicts are not causing any problems; they're not doing anything at all. Removing unused and logically-deprecated layouts will help identify whether and how much this feature is actually being used. Ideally it can be simplified to a single layout for all users, removing the need for Groups involvement and any coordination with user roles.

### CiviCRM Extension: Custom CiviCRM Permissions

The [Custom CiviCRM Permissions extension](#) has been used to create what are effectively *user roles* but have been added here as *permissions*. This is somewhat out of place. CiviCRM permissions are things like "view all contacts," "create contribution," or "delete activity," not things like "state admin."

Tentatively, it appears that these roles were defined, via this extension, as CiviCRM permissions. There are a lot of occurrences of `if ( ! current_user_can( '[PERMISSION]' ) )` in this site's custom code. It appears that these *roles* were defined as *permissions* specifically so this one method could be used to check the current user's role for particular operations.

Recommendation: **remove this**. Modify custom code to check permissions in a standard way, preferably by checking for a relevant CiviCRM permission rather than an effectively hardcoded user role. When the code updates have been completed, uninstall this extension.

### CiviCRM Custom Extensions

There are a number of customs which specifically affect permissions within the system, such as most of the code in `/civicrm_custom/CRM/`

Suggestion: **clean up these custom extensions by reviewing them individually**. For each one: document its functionality, research and document the purpose, confirm the continued need (or not).

As a preliminary or short-term step, have an experienced CiviCRM developer review custom extensions for potential resource and performance issues.