



**Mid-Hudson Library System**

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103 Market Street, Poughkeepsie, New York 12601 | tel 845.471.6060 | fax 845.454.5940 | <http://midhudson.org>

# Action Plan Template

**Project Title:** Cardholder Activation & Retention **[EAST FISHKILL]**

**Project Description:** To engage community members in a way that inspires them to interact with library services and programs so that more community members are aware of, use, and find value in their local public library.

**Project Goal:** Active Cardholder Retention Rate – Increase of 5%

**Timeline:** March – November 2018



## Essential Factor #1: Welcoming Email

### Key Steps I Need to Take:

- Get email at time of registration
- Pull a create list monthly
- Text of the email (from the lib director)?
- Method of delivery (Constant Contact or general email)
- Any response will be acknowledged within 48 hours

### Timeline:

Institute by 5/1/18

### Support I Need:

Some staff time

### Resources I Need:

#	Action Item	Owner	Due	Status
1	FOR EMAIL – Draft email	Gloria	4/9	
2	Pull Weekly List	Maria	--	
3	Teach Maria how to use CC	Gloria	4/26	
4	Send email every Thursday	Maria	4/26	
5	FOR POSTCARD (those w/o email) – Draft p/c	Gloria	4/9	
6	Include postcard with application & card so it's ready to mail asap	Vol	5/1	
7	Gloria – pre-sign p/cs	Gloria	5/1	



## Essential Factor #2: Notify patrons when cards are about to expire (print & email)

### Key Steps I Need to Take:

- Pull monthly create lists to identify patrons whose cards are about to expire
- Drafting text for the message
- Design the print version
- Design the email version
- Create process to manage the responses

### Timeline:

Institute by 5/1

### Support I Need:

Staff who can send CC emails  
Staff who can pull lists

### Resources I Need:

#	Action Item	Owner	Due Date	Status
1	FOR EMAIL – Draft email	Gloria	4/9	
2	Pull list 6 days prior to the end of the month for the cards expiring the following month	Kristie	4/23	
3	Send Email	TBD	5/1	
4	FOR POST CARD – Draft	Gloria	4/9	



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5	Send p/c for those w/o email addresses	Clerk TBD	4/15	
6	Monitor responses to determine effectiveness of each	Maria	5/1	
7	Review general procedure	Gloria, Maria, Cath, Kristie	6/1	

### Essential Factor #3: “The Welcome Experience” New Card Edition

#### Key Steps I Need to Take (just pick five):

- Script/talking points for frontline staff
- ~~Staff education to carry out exchange~~
- Outline the tour – start with, “What brought you in to the library today?”
- Assess what you physically hand a new cardholder
- ~~Feedback loop with staff to fine tune~~
- Analyze your current registration process to see if it can be made better (in person and online)
- ~~Allow temporary cards to be issued~~
- Create postcard that can be mailed to help with “proof of residence” requirement

#### Timeline:

Initiate by 5/15/18

#### Support I Need:

Buy-in from staff

#### Resources I Need:

More info on online registration



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#	Action Item	Owner	Due Date	Status
1	Review current procedure	Gloria	4/9	
2	Review current patron packet	Gloria	4/9	
3	Simplify current packet	Gloria & Cath	5/1	
4	Institute online registration	Gloria, Cath, Laurie S.	5/1	
5	Design proof of residence postcard	Gloria	5/1	
6	Script talking points	Gloria & Cath	5/1	
7	Train Staff	Gloria, Cath, Krisite	5/13	