Action Plan Template

**Project Title:** Cardholder Activation & Retention [PLEASANT VALLEY]

**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 – Bethany can create
- Text of the email (from the lib director)?
- Method of delivery (Constant Contact or general email) – general email
- Any response will be acknowledged within 48 hours

Timeline:
Starting in April looking at March.

Support I Need:

Resources I Need:

<table>
<thead>
<tr>
<th>#</th>
<th>Action Item</th>
<th>Owner</th>
<th>Due Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Create List</td>
<td>Bethany</td>
<td>monthly</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Craft Email text</td>
<td>Daniela</td>
<td>4/2/18</td>
<td></td>
</tr>
</tbody>
</table>
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:

We’re going to mail in May/June, back to email in July/August, mail Sept/Oct. Double check the difference.

Support I Need:

Resources I Need:

<table>
<thead>
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<th>Action Item</th>
<th>Owner</th>
<th>Due Date</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Order More Postcards</td>
<td>Daniela</td>
<td>ASAP</td>
<td></td>
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<tr>
<td></td>
<td>Buy more stamps</td>
<td>Daniela</td>
<td>ASAP</td>
<td></td>
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<tr>
<td></td>
<td>Note mail v email response</td>
<td>All staff</td>
<td>ongoing</td>
<td></td>
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Key Steps I Need to Take: Select 5

- 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:
April 1 for the Temp Card rollout. New postcard by mid-April? New brochure by May?

Support I Need:
Buy in from staff.
New patron welcome area on website?
Teen Card? No parent permission?

Resources I Need:

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<th>Due Date</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Temporary Card</td>
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<td></td>
<td>Postcard for Residency</td>
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<td>4/16/18</td>
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<td>Brochure for New Card</td>
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<td>5/1/18</td>
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<tr>
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<td>Pep Talk Staff</td>
<td>All</td>
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<tr>
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<td>Maybe a Staff Meeting</td>
<td>Staff Invested</td>
<td>Mid-May?</td>
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