



Mid-Hudson Library System

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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:

#	Action Item	Owner	Due Date	Status
	Create List	Bethany	monthly	
	Craft Email text	Daniela	4/2/18	



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:

#	Action Item	Owner	Due Date	Status
	Order More Postcards	Daniela	ASAP	
	Buy more stamps	Daniela	ASAP	
	Note mail v email response	All staff	ongoing	



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

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:

#	Action Item	Owner	Due Date	Status
	Temporary Card	Daniela	4/2/18	
	Postcard for Residency	Daniela	4/16/18	
	Brochure for New Card	Daniela	5/1/18	
	Pep Talk Staff	All		
	Maybe a Staff Meeting	Staff Invested	Mid-May?	