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**Strategic Plan
American Philatelic Society
American Philatelic Research Library
2016 to 2020**

**Approved Unanimously by the APS Board of Directors
Approved Unanimously by the APRL Board of Trustees**

**January 28, 2016
February 23, 2016**



AMERICAN PHILATELIC SOCIETY

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TO: Members, American Philatelic Society and American Philatelic Research Library
FROM: Scott English, Executive Director
DATE: 28 March 2016
RE: Strategic Plan – 2016 to 2020

Enclosed is the strategic plan for the APS and APRL from the present until 2020. It proposes shaping the direction of the APS and APRL going forward in four major goal areas: Sustainability, Education, Accessibility, and Membership. Each of these goal areas takes on its own importance, but they are interdependent in making the APS and APRL organizations that will grow in strength, influence and size for years to come.

First, we collectively owe a debt of gratitude to the members of the APS and APRL. Through financial support, time given, and intellectual ability, the APS and APRL have been serving the philatelic world for nearly 130 years and 47 years respectively. Our single biggest asset in meeting the needs of the APS and APRL will come from the continued support, energy, and recruitment of our members.

In addition, thanks to the members of the Joint APS/APRL Strategic Planning Committee for engaging in and guiding this process to deliver the product before you. Each member of the Committee has given great time and thought to building a collective plan we can support. We should also thank the members of the stakeholder Committees, who have provided critical feedback, leadership, offered time and intellect, not just to developing the plan, but to seeing that it will be successfully implemented. Their work has only just begun now that this plan has been adopted.

Finally, thank you to the staff and volunteers of the APS and APRL team for the commitment to developing this document and many of the objectives within. Each member of the team embraces the notion that we can add value to the services we provide and to the hobby we support in Bellefonte and around the globe. Several activities in this plan are already underway and we will rise to the challenge of growing and serving our members and philately.

In some ways, this plan is an evolution of the Strategic Plans adopted in 2004 and the “Into the Future” report developed by the Long Range Planning Committee and adopted by the APS Board in 2010. There was no need to “reinvent the wheel” but rather combine unfinished business with some lessons learned to make this plan a reality.

This report comes with two specific commitments not outlined in the plan:

1. That it becomes the backbone of our discussions and planning – not simply a place to gather dust,
2. That we continue to evaluate and make course corrections along the way, rather than wait to see if, in 2020, all the work got done.

I believe the hobby and the APS have an incredibly bright future. This plan provides a focus on what we all want to accomplish, serving our members, educating the public, and growing the hobby for years to come. Thank you for the opportunity to serve the current and future membership of the APS and APRL.

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Introduction

APS Mission Statement: The American Philatelic Society is a tax-exempt organization dedicated to preserving and promoting the collection and history of stamps.

How We Do It:

- Promote stamp collecting for people of all ages
- Serve APS members and philately in general, through education and collegiality
- Lead and partner on new programs to benefit stamp collectors and stamp collecting
- Represent the United States in the world body of philately
- Assist members in acquiring, preserving, protecting and disposing of philatelic materials

APRL Mission Statement: The American Philatelic Research Library is a tax-exempt organization dedicated to preserving philatelic literature and promoting the research of philately.

Areas of Focus: In order to accomplish the respective missions of the organizations, the activities are broken into four major categories:

- **Sustainability:** Keeping the organizations financially strong,
- **Education:** Teaching students and collectors through stamps,
- **Accessibility:** Making the organizations and the vast information we have more available to members and the world,
- **Membership:** Growing the APS and APRL and the hobby.

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Sustainability

Mission: Make the American Philatelic Society (APS) and the American Philatelic Research Library (APRL) financially sustainable and able to support member services on a long-term basis by becoming debt free by 2025. To achieve this goal, the APS and APRL will begin a joint effort to raise \$10 million in 10 years. Of that amount, \$5.6 million will go to finishing construction of the library and paying down current mortgage debt. Another \$2 million will go to sustaining and growing the education programs, \$1 million will be dedicated to digitizing and making the APS and APRL more accessible, and \$1.4 million to improving membership services as outlined in this plan.

Goal 1: Finish the Job—Completion by Close of 2016 (\$600,000)

Background: In August 2015, the American Philatelic Research Library Board of Trustees approved the final phase of construction for the new library at the American Philatelic Center (APC) in Bellefonte, Pennsylvania. The project will increase APRL's size by 50 percent over the current space. In the final phase, additional requirements for fire suppression and other safety modifications, along with additional relocation costs have added up to \$600,000 in unexpected costs. Although a line of credit has been approved—fundraising efforts began to reduce borrowing costs with the aim of not adding debt to the APRL's balance sheet.

Action: The Campaign for Philately, the fundraising arm of the American Philatelic Society and the American Philatelic Research Library, has made raising \$600,000 by the end of 2016 its top priority.

Goal 2: Become debt-free by 2025—Completion by the end of 2025 (\$5 million)

Background: In 2002, the American Philatelic Research Library purchased a former match factory in Bellefonte, Pennsylvania, to become the headquarters for the APRL and the American Philatelic Society. Renovations began and the APS and APRL relocated to the American Philatelic Center in 2004. Today, the APC sits on nearly six acres of property covering nearly 100,000 square feet. The APS and APRL utilize 55,000 square feet, and the remaining space is leased to 11 tenants. In total, the APRL has spent approximately \$16 million to improve the APC, and by the end of 2015, \$5 million of debt remains to be repaid within the next 20 years.

Action: The Campaign for Philately has committed to raise \$5 million in 10 years, specifically to eliminate the mortgage debt held by the APRL. Accomplishing this goal would retain \$420,000 annually for other purposes. Further, raising the funds would allow the APRL to save up to \$1 million in additional interest expense from 2025 to 2035.

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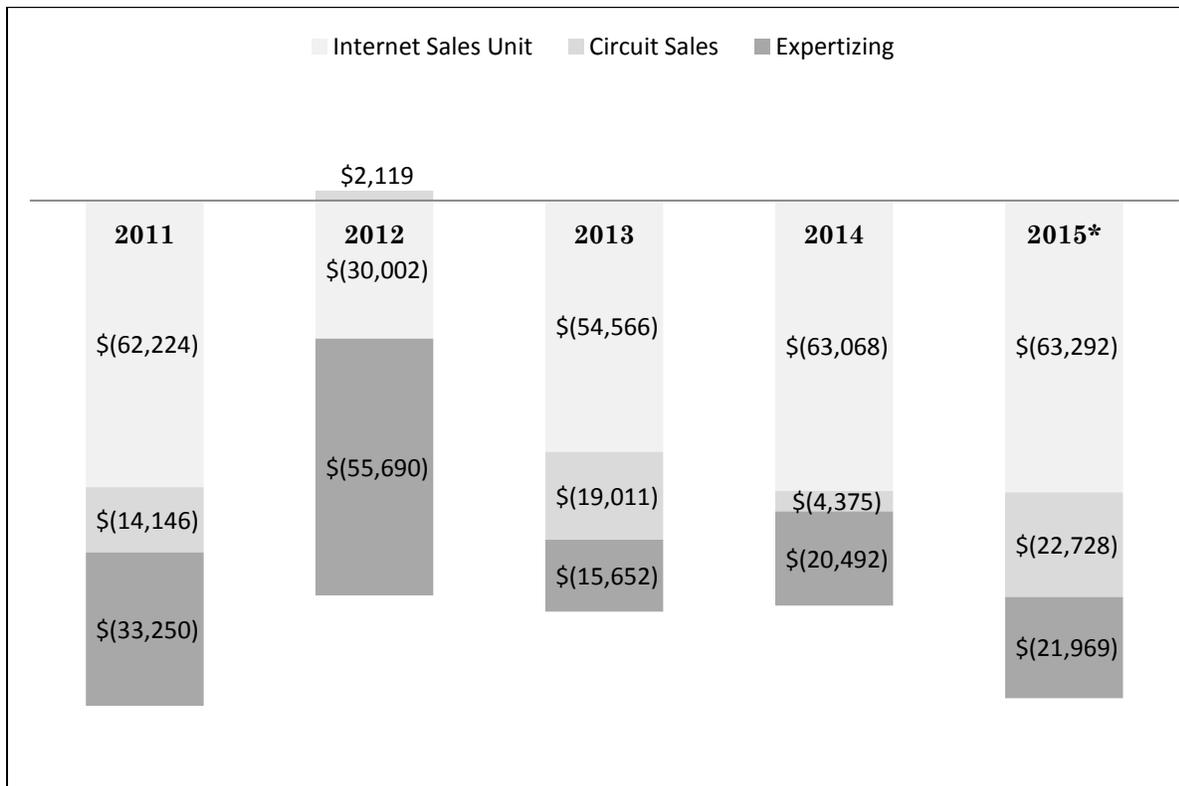
Goal 3: Make Sales and Expertizing self-sustaining in five years

Background: The APS provides three user-supported member services that go to enhancing the value of a member’s personal collection. Expertizing, through the American Philatelic Expertizing Service (APEX), identifies U.S. and worldwide stamps, including condition analyses, and protects against fakes, frauds, and forgeries. This service has been provided through the assistance of experts throughout the world since 1903 and represents the longest-running philatelic expertizing service in existence today.

Circuit Sales was established at the founding of the American Philatelic Society in 1886 as a stamp exchange and has grown into a major clearinghouse nearly 130 years later.

Internet Sales, a service first offered as a web-based sales site for members starting in 2000, sells more than 70,000 items each year to members and non-members. Over the past five years, these three services have operated at losses ranging from a high of \$109,620 in 2011 to a low of \$83,573 in 2012.

Throughout the past five years, these services have operated at an estimated \$478,346 loss to the APS. Over the next five years, one of the goals of the APS should be to ensure these services are delivered in the most cost-effective manner possible, and that they are not subsidized through membership dues.



*Through 11/30/2015

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Actions: Through a series of steps to increase sales, decrease operational costs and increase revenue, these three services should each be self-sustaining by 2020. Specifically, actions to assist in this goal will include:

- 1. Increase Internet Sales by 10 percent each year.**
- 2. February 2016: Completion of web-based Circuit Sales system.**
- 3. December 2016: Increase member participation in Circuit Sales from 11 percent to 12 percent.**
- 4. Merge Circuit Sales and Internet Sales units into one Sales Division in 2017.**
- 5. Increase Expertizing fee revenue by 5 percent annually.**
- 6. Complete a fee-cost evaluation in 2016 to understand where the losses occur and provide a basis for informed decisions about profitability.**
- 7. Increase promotion of Internet Sales through various online means, current promotion is typically only done through *The American Philatelist*.**

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Education

Mission: Increase learning opportunities for collectors of all skills and ages, and promote education through philately.

Goal 1: Design APS youth programs with the commonly-adopted classroom standards in each state by the 2017-2018 school year. (Target date: May 2017)

Background: As part of the APS philanthropic mission, the education department has established several youth programs to open the world of stamps to students from elementary school to young adults. According to the most recent survey by the APS, nearly half of members began collecting between ages 8 and 10. Taken a little further, approximately 84 percent of members started collecting before graduating from high school. At the same time, half of the membership consists of more active collectors ages 40 and older. So, while bringing stamps to young people can produce collectors, turning them into committed collectors could take decades. To reach a broader audience, the APS will design its youth programs to classroom-friendly standards and increase promotion to public school teachers and other youth-oriented programs, such as Boy Scouts and Girl Scouts.

Action: The APS plans to form a partnership with the National Postal Museum and the U.S. Postal Service to review the Stamps Teach program and, with their education experts, volunteers, and resources, revise the material to meet the needs of the public classroom teacher as a teaching tool. Further, the APS will begin promotion of Stamps Teach through various national and statewide education associations to increase awareness.

Goal 2: Establish performance measures for the youth programs and create a continuum across the programs to more effectively recruit from each level to the next.

Background: Over the past five years, the APS has established a tiered approach to the youth programs, from Stamps Teach to Young Stamp Collectors of America to the Young Philatelic Leaders Fellowship. Here is how the programs work:

Entry-level: *Stamps Teach* is designed to put stamps in the hands of students in the classroom. This program has been funded through donations of funds and stamps by members. Thanks to a matching grant from the TurningPoint Foundation, the pilot program in 2012 has grown to a program with a \$50,000 budget in 2015. We will need to identify a new source to renew or replace the TurningPoint matching grant, which has expired, to maintain the same level of service beyond the 2015-2016 school year.

Intermediate-level: *Young Stamp Collectors of America* (YSCA) is an APS division created to promote the hobby to young collectors through the Internet. The program is funded through annual membership fees ranging from \$10 for any collector under 18, \$15 for a family membership for more than one young collector and \$20 for adult collectors who want to support the program. The YSCA hosts a monthly online meeting of members, offers

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a members-only site and hosts two annual meetings at APS shows. Stamps Teach participants are given a free, one-year membership to the YSCA, but there are currently no measures for retention.

Advanced-level: *Young Philatelic Leaders Fellowship* (YPLF) is a year-long program for high school and college-aged collectors to get a more intensive perspective on philately and a specific area of interest, paired with a mentor. The YPLF participants serve at booths at both APS annual shows, participate in Summer Seminar and tour places such as the National Postal Museum. Even after their year in the program, YPLF alums have actively participated in philately and APS events, and APS encourages them to continue.

Participants by Year and Program

Year	Stamps Teach	YSCA	YPLF	Total
2015	5743*	436	3	6182
2014	17333	356	2	17691
2013	4113	315	5	4433
2012	3734	245	3	3982
2011	n/a	180	5	185

**Order fulfillment continues through 2016*

Actions:

1. **December 2016:** Complete development of program measurements and implement recruitment and retention plans for all youth programs.
2. **December 2016:** Produce a multi-year financing plan to manage and promote the youth programs.
3. **August 2017:** Establish and maintain 5 YPLF candidates annually as stand-alone program.
4. **August 2018:** Recruit 50 percent of the YPLF participants from the YSCA program.
5. **December 2018:** Achieve 35 percent retention within the YSCA program beyond one year.
6. **December 2018:** Recruit 10 percent of Stamps Teach participants to join the YSCA.

Goal 3: Increase participation in APS member education courses.

Background: While educating APS members is embedded in many of the activities APS staff supports, from the website to *The American Philatelist* magazine, the APS also makes a concerted effort to provide courses addressing various elements of philately. APS offers sessions at stamp shows, known as “On the Road” courses; the Summer Seminar held at the headquarters every June; and online courses throughout the year. However, even if APS

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assumed each registrant participated in just one educational offering, less than 1 percent of the APS membership is served annually in a course.

Participation in Member Education Courses by Year

Year	On the Road			Summer Seminar	Online Courses		
	Courses	Enrolled	Per Course	Enrolled	Courses	Enrolled	Per Course
2015	3	56	19	64	4	28	7
2014	7	78	11	83	4	29	7
2013	8	68	9	68	3	42	14
2012	11	80	7	71	3	31	10
2011	10	86	9	71	3	46	15

Actions:

On the Road

1. **2016:** At least 4 “On the Road” courses offered with a minimum of 70 participants.
2. **2017:** At least 5 “On the Road” courses offered with a minimum of 80 participants.
3. **2018:** At least 6 “On the Road” courses offered with a minimum of 100 participants.

Summer Seminar

1. **2016:** At least 70 participants in the Summer Seminar courses.
2. **2017:** At least 75 participants in the Summer Seminar courses.
3. **2018:** At least 80 participants in the Summer Seminar courses.

Online Courses

1. **2016:** At least 4 courses offered with a minimum of 32 participants.
2. **2017:** At least 5 courses offered with a minimum of 40 participants.
3. **2018:** At least 6 courses offered with a minimum of 48 participants.

Goal 4: Create Collecting Course Certificates and a capstone “Master Philatelist” certificate.

Background: In the 2010 “Into the Future” report produced by the APS Long Range Planning Committee, there was to be a Master Philatelist certificate implemented by 2015. Since that time, no program has been developed and implemented. The demand for such a program remains, and APS should move forward. In implementing the program, APS should develop it in two steps: First, define the course curriculum and what material should be mastered for each subject. Second, build those programs into a long-term, sought-

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after challenge for collectors. Several hobby organizations similar to APS have comparable certification programs, so the APS would have several models to evaluate for development and implementation.

Actions through the Collector and Student Education Committee:

1. **December 2016:** Develop the course requirements for the Master Philatelist certificate.
2. **December 2016:** Develop the curriculum for a minimum of three certificate courses to be offered in 2017.
3. **December 2017:** Develop the curriculum for a minimum of four certificate courses to be offered in 2017 and review Year One progress of certificate courses.
4. **December 2018:** Develop the curriculum for the remaining certificate courses and review Year Two progress.
5. **December 2019:** Through the APS education department, issue the first Master Philatelist certificates to graduating members and perform Year Three review of courses.

Goal 5: Create an on-demand educational library for education.

Background: Throughout the country, more opportunities for on-demand learning content are available through higher education providers and platforms, such as Stanford University or iTunes. Shorter version videos provided at sites like Khan Academy, are smaller learning units of two minutes or less offering education for a more mobile learner. While the APS has offered long-form videos of lectures and talks through the website and YouTube, up to an hour long, those videos are merely preserving in-person events and not designed as educational video segments. As APS builds out the program, APS intends to offer videos in two formats: segments of no more than five minutes on elements of collecting and TED Talk-style videos of 15-20 minutes on collecting topics by collectors, exhibitors and researchers.

Actions:

1. **December 2016:** Rollout of pilot videos on APS services and collecting.
2. **December 2017:** Development of segmented videos on four collecting education areas.
3. **December 2018:** Full implementation of a collectors' video library with short- and long-form videos.

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Accessibility

Mission: Open up collecting resources of the APS and APC to members and the general public.

Goal 1: Complete the renovation of the American Philatelic Center by 2018.

Background: In August 2015, the APRL Board of Trustees approved construction of a new library space within the APC. The space will increase the library size by 50 percent, relocating the whole operation to Buildings 3 and 4 in the APC complex. With the completion of that relocation, the APRL will be able to operate with growth capacity for years to come. At the same time, the current library space, known as the Osborne Morse Building, will no longer be used as library space and will be repurposed for museum and education space.

Actions:

1. Library construction completed by spring 2016.
2. New library space operational by summer 2016.
3. Public grand opening of library space in October 2016.
4. Conversion of the Morse Building to multi-use space by December 2017:
 1. Philatelic museum space/rarities gallery
 2. Educational work area/classroom
 3. Storage for donated educational material

Goal 2: Increase access to philatelic literature and research for APS and APRL members and the public at large.

Background: Today, members enjoy access to an electronic archive of *The American Philatelist* dating back to 2007 and the *Philatelic Literature Review* dating back to 2009. In addition, digital editions of *Japanese Philately* are stored on APRL servers, and other scanning projects are ongoing. APRL staff initiated a project to make the content accessible and searchable online, but has not been completed at this time. While there is no projected completion date, the APRL staff will establish a timeline to complete the project.

In terms of physical (printed matter) acquisitions, generous donations of literature have sustained much of the library's collections over the years and will continue into the foreseeable future. One of the challenges with donated material is not being able to plan for intake, cataloging and making the material available to members. At this time, APRL has collections that have not been able to be put into use without additional manpower. After completion of the library space in 2016, the APRL will undertake an effort to make donated acquisitions available in the library and as digital material available through the web or in searchable format.

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Actions:

1. **December 2016:** The APS and APRL staff will undertake a review of in-kind donation policies to provide clear guidance on acceptable material, prioritization of use and digitization goals.
2. **December 2016:** Increase of digital access to *The American Philatelist* dating back to 1990.
3. **December 2016:** Completion of the online searchable access to content to be completed.
4. **December 2017:** Elimination of backlog of current library donations to use in the philatelic community.
5. **December 2017:** Implementation of software to share finding aids with other databases inside and beyond the philatelic research area.
6. **December 2018:** Offering of complete digital access of *The American Philatelist* and *Japanese Philately* and access to the *Philatelic Literature Review* dating back to 2000 for APS and APRL members.
7. **December 2019:** Complete digital access to the *Philatelic Literature Review*.

Goal 3: Increase both the American Philatelic Society and the American Philatelic Research Library as a greater national presence to non-members and non-collectors.

Background: With the introduction and reliance on social media and other non-traditional forums to provide content and information to the general public, it is now easier to get the message out to the world at large. The APS has a very active website and over 6,000 followers on Facebook.

Moving forward, APS staff will work to increase the APS/APRL online presence to capture a broader audience to promote not only the organizations but also philately. The APS/APRL will also work to build more consistent contact with media, philatelic and non-philatelic, to promote the hobby and the organization.

Actions:

1. **December 2016:** Build a Facebook following to at least 12,000.
2. **December 2016:** Successfully integrate daily social media postings to include promotion of APS/APRL services, stamp news and the hobby.
3. **December 2016:** Establish a free, non-member email database to communicate and promote APS services and the hobby.
4. **December 2016:** Complete at least one online town hall meeting for APS members, which will become an annual event.
5. **January 2017:** Complete a national media database sorted by philatelic and non-philatelic contacts.
6. **January 2017:** Complete and post an online media kit for non-philatelic media outlets.

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7. **December 2017:** Complete the first full year of at least once-monthly news releases promoting the APS and the hobby to both philatelic and non-philatelic media outlets.
8. **December 2017:** Complete redesign of the APS and APRL websites.

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Membership

Mission: Increase services to current APS members and grow the membership. In evaluating membership, there are eight general categories:

1. **Existing Membership:** Members of the American Philatelic Society are the organization's biggest assets and recruiters. The retention rate for members of three years or more remains greater than 90 percent.
2. **Existing Collectors:** Collectors who are actively engaged in the hobby or purchasing stamps, but have not joined the APS for some reason.
3. **The Lost and Found:** Collectors at an earlier age, but who stopped to pursue education, career, and/or family. With family changes and established careers, this group has reignited the collecting interest.
4. **Retirees/Senior Collectors:** Former and new collectors who have left the workforce and are looking for the community and social elements of collecting. They may live at home or in an assisted living/long-term care facility.
5. **Entry-Level Adult Beginners:** Adult collectors who have started participating through a friend or as a need to develop a hobby. This group of collectors can be the most fragile, dropping out before the investment is too great.
6. **International Collectors:** The APS currently has 1,500 members from outside the U.S. – roughly half living in Canada. The APS is the world's largest stamp collecting member organization and has the potential to look closely at building a greater membership base in the Americas.
7. **Young Collectors:** This is the student-level and young adults who are still active collectors. While this may not yield an immediate impact on membership, we are committed to this group as a means of promoting philately and education.
8. **Investors:** There are those who have committed resources to purchasing stamps as an investment – either high-end stamps or as a buying and selling opportunity through internet or other means.

Goal 1: Strengthen recruitment to the APS/APRL through the Chapters and Affiliates and form a stronger philatelic grassroots network.

Background: Since the founding of the APS, local chapters and affiliates have been an important part of growing the national membership. Local chapters or stamp clubs provide services to members and can also be a part of the APS network of clubs. Chapters pay to be part of the APS unless a third or more of their membership belong to the APS. In 2015, 63

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percent of the chapters qualified for free membership. At the same time, only 48 percent of the reported chapter membership of 16,608 belongs to the APS. There are currently 195 active affiliates, which are national organizations that support the mission of the APS and APRL. In both cases, there are collectors who belong to more than one club or affiliate, so the overall number of potential members could be smaller. Still, chapters and affiliates represent the greatest opportunity for recruiting members to the APS, and the APS staff should make efforts to strengthen the organization's relationships and promotion to chapters' and affiliates' leaders and members.

Actions:

1. **December 2016:** Redesign APS Chapter and Affiliate resource material and convert the Chapter and Affiliate Liaisons to APS Ambassadors to recruit and support new members.
2. **December 2016:** Create an incentive program for Chapters and Affiliates that lead the way in recruiting APS members.
3. **December 2016:** Complete an implementation of an online Chapter and Affiliate membership report.
4. **January 2017:** Complete the Ambassadors contact list, and begin twice-yearly conference calls.
5. **December 2017:** Achieve 70 percent of Chapters qualifying for free APS membership and at least 55 percent of total chapter membership belonging to the APS.
6. **December 2018:** Achieve 75 percent of Chapters qualifying for free APS membership and at least 60 percent of total chapter membership belonging to the APS.

Goal 2: Use partnerships to increase the APS/APRL reach beyond the current membership and provide value-added, non-APS services to APS membership.

Background: Today, the APS/APRL enjoy good relations with the American Stamp Dealers Association, National Stamp Dealers Association, Amos Media (Linn's Stamp News and Scott Catalogs), the U.S. Postal Service, the National Postal Museum, the Philatelic Foundation and other national, philatelic-related organizations. Each represents a different constituency aimed at the same purpose, which is promoting the hobby and preserving stamp collecting for the next generation. As each group addresses the challenge of a decline in active participation, there are opportunities to leverage the services each provides for the benefit of their different constituencies or for the good of philately. All of these relationships allow APS to unite resources to promote the hobby and reach an audience outside of the APS. In addition, other national organizations establish corporate partners to provide direct services to their memberships. In the case of the APS, we have had a longstanding relationship with Hugh Wood Insurance to provide insurance coverage for members.

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Action: APS staff will undertake an effort to develop two partnerships each year to provide value-added, non-APS services to APS members or leverage resources to promote the hobby. The ultimate goal is to develop a partnership that will allow APS to co-locate one or both of the APS national shows with another national organization—inside or outside the hobby. Through these partnerships, APS will also undertake building a prospect file for direct mail marketing and electronic marketing of the APS and its services.

Goal 3: Increase and improve contact and solicit feedback from current and former APS members.

Background: Today, members have options to get information from the APS through *The American Philatelist*, a monthly electronic newsletter, calls to headquarters, written and electronic communication, general membership meetings at both national stamp shows, visits to World Series of Philately shows and the APS website. While that communication meets the needs of some members, APS will work to build access to information about the hobby and the Society through varying means of feedback. In addition, the APS last completed a membership survey in 2007 and while some of that information is still useful, it is not current. The APS will work to increase feedback opportunities for current, former, and potential members of the Society.

Actions:

1. **September 2016:** First online town hall meeting for members unable to travel to APS annual shows.
2. **October 2016:** Pilot of “Ask an Expert” online forum.
3. **December 2016:** Redesigned member electronic newsletter and broken into two specialized categories.
4. **December 2017:** Survey of current, former, and potential members of the APS completed.
5. **December 2017:** Complete redesign of APS/APRL website.
6. **December 2017:** At least two online town halls completed and two more “Ask an Expert.”

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Acknowledgements – This strategic plan is the result of the hard work of dedicated volunteers from the American Philatelic Society and American Philatelic Research Library leadership, Committees, and members, along with the staff of the APS and APRL. Each one has committed not only to developing this plan, but making it successful.

Joint APS/APRL Strategic Planning Committee

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Thomas W. Horn, Director of Circuit Sales
Bill Dixon, Circuit Manager
Carol Hoffman, Sales Division Administrative Assistant
Kay Peters, Sales Division Retirement Coordinator
Ruth Ann Mayes, Sales Circuit Member Coordinator
Darlene Young, Sales Circuit Clerk

Internet Sales Team

Wendy Masorti, Director of Internet Sales, Webmaster & Complaints Manager
Kelley Binkley, Assistant to Director of Internet Sales
Stephanie Frankhouser, Internet Sales Processing Clerk
Dennis Gilson, Volunteer

Expertizing/APEX Team

Mercer Bristow, Director of Expertizing
Krystal Harter, Expertizing Coordinator

Finance and Operations Team

Lisa Clemson, Staff Accountant
Megan Crater, Staff Accountant
Fred Fox, Building Superintendent

APS Stamp and Cover Shop

Richard Nakles, Volunteer