



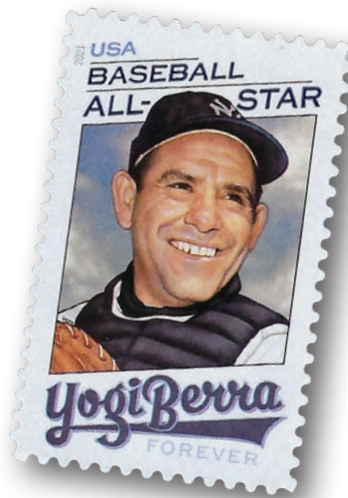
AMERICAN PHILATELIC SOCIETY

Strategic & Operations Plan
2026 – 2030



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“If you don’t know where you are going, you’re going to wind up someplace else.”

– Yogi Berra

A Message from Leadership



Organized philately is not about stamps. It is about people and the infrastructure that connects them. It is about friendships formed at stamp shows and club meetings. It is about the quiet generosity of a mentor explaining plate varieties to a new collector. It is about the shared language and knowledge, created and reinforced by generations of collectors. It is about the fellowship and the spirit of curiosity that make this hobby so deeply rewarding.

Stamps and covers do not carry intrinsic value on their own – they are designed to be used and discarded. Yet for us, these ephemeral objects are imbued with deep meaning and value. The stories, history, and worth of our collections are constructed through the ecosystem that organized philately provides. That ecosystem does not happen by accident. It exists because generations of collectors built the organizations, wrote journal articles, mentored newcomers, preserved archives, and gathered in clubs and societies to share what they knew and loved.

The American Philatelic Society (APS) is entrusted with maintaining that ecosystem and nurturing the community it supports.

For many collectors, the introduction to stamp collecting came naturally. A parent or grandparent handed them an album. They watched the mailbox with anticipation. They asked a neighbor to save envelopes from overseas, and they spent their allowance at the post office on a new issue. The on-ramp to philately was simple and organic. A curious child, drawn by history, geography, genealogy, art or design, could easily build their collection from the resources readily available to them.

That world has changed. Today's mailbox rarely delivers surprises, and communication has largely gone digital. The natural exposure that once sparked a lifelong hobby is far less common. Yet the underlying curiosity that drives people to the hobby remains as strong as ever.

If the hobby is to thrive, we cannot rely on nostalgia. Our community, and the infrastructure that supports it, must evolve. We must find new on-ramps to introduce the curious to the world of stamps and organized philately. And we must meet newer generations where they are, while relying on the experience and loyalty of the collectors who built the infrastructure on which our community now stands.

This strategic plan is rooted in that balance. It honors the programs and services our members deeply value, while recognizing that infrastructure must be modernized, digital engagement must expand, and the value proposition of organized philately must continue to evolve in a changing world. Innovation does not replace tradition. It complements it.

By strengthening our systems, creating compelling content, improving engagement tools, expanding educational opportunities, enhancing the member experience, and living up to our core values—we safeguard the infrastructure and nurture the community that sustains organized philately. We don't seek change for its own sake. We seek steady, thoughtful, and disciplined progress to secure the hobby's future.

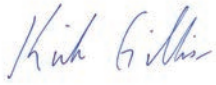
This plan was shaped with the input of staff, volunteer task forces, board members, individual members and other thought leaders who care deeply about organized philately. It reflects both realism and

optimism. It recognizes that the hobby has evolved before and commits to evolving it again. Most importantly, it affirms that organized philately remains essential.

Philately is a big tent. There is room for the traditionalist and the thematic collector, the postal historian and the digital researcher, the seasoned exhibitor and the beginner filling their first album. There is no single path into philately, and no single definition of the right way to collect. The role of the APS is to hold that tent open wide—to make the community stronger, more welcoming, more vibrant, and more relevant with each passing year.

Together, we will ensure that organized philately and the APS thrive and touch the lives of many generations to come.

With gratitude for your support and confidence in our shared future,



Kirk Gillis
Executive Director



Mark Banchik
APS President



Murray Abramson
APRL President



Lawrence Haber
Treasurer



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1. Executive Summary & Timeline



The American Philatelic Society stands at an important moment in its history.

Over the past decade, APS has successfully stabilized its finances, eliminated organizational debt, and preserved the core institutions that support organized philately in the United States.

At the same time, the broader philatelic landscape continues to change and evolve. Membership has gradually declined as the collector population ages, while the ways people discover hobbies and connect with communities have evolved dramatically in the digital era.

This strategic plan is designed to address that reality in a way that strengthens the APS community while preserving the traditions and values that make organized philately meaningful.

Growth is necessary because a larger and more engaged community is essential to maintain and preserve what APS members value most: community, education, ethical marketplaces, fellowship, and the preservation and accessibility of philatelic knowledge.

Most importantly, the actions required to grow the APS community will also make APS more vibrant, more active, and more valuable for current members.

Over the next five years, members can expect to see a Society that is:

- **Producing significantly more engaging content** that celebrates stamps, postal history, and the stories behind them
- **Expanding opportunities to learn**, explore new collecting areas, and connect with experts and fellow collectors
- **Creating more opportunities to connect with other collectors**, both digitally and in person
- **Working more closely with APS chapter clubs and stamp shows** to strengthen the grassroots community of organized philately
- **Strengthening ethical marketplaces** where collectors can confidently buy and sell philatelic material at all price levels
- **Bringing new energy to stamp shows** through improved programming and outreach
- **Reaching new audiences** and welcoming new members who share the curiosity and interests that naturally lead to philately

In short, APS will become a more visible, more dynamic, more connected, and more welcoming community for collectors at every level.

The strategic plan focuses on three primary opportunities for growth:

1. Active collectors who are not currently APS members
2. Retirees who collected as children and seek retirement hobbies that offer intellectual engagement and community
3. Curiosity-driven target audiences whose interests in history, geography, genealogy, art, culture, and global storytelling naturally align with philately

By connecting these audiences with the APS community, the Society will grow its membership while simultaneously strengthening the programs and services that current members value. The goal is a larger membership base, and a more vibrant and financially sustainable organization that secures the future of organized philately.

High-Level Implementation Timeline

While the plan includes many initiatives, most fall into several major phases that build upon one another.

2026: Foundation and Infrastructure

The first year focuses on strengthening the infrastructure needed to support long-term growth.

Key efforts will include:

- Major technology modernization and systems integration
- Restructuring, upskilling and empowering the APS team to succeed
- Development of a new APS website and digital member experience
- Expansion of content creation capacity and educational materials
- Strengthening and clearly defining the APS value proposition
- Launch of improved marketing and communication capabilities
- Strengthening relationships with chapter clubs, show organizers and volunteers

These investments will provide the foundational tools needed to connect collectors, deliver content, attract interest, and welcome collectors into the APS community.

2027: Launch and Activation

The launch of the new APS website and supporting technology platform will mark a major milestone.

Following the website launch, APS will begin putting new tools and capabilities into use across the organization, including:

- Expanded digital content and educational programming

- Improved member engagement tools
- Continued website enhancements including expanded online marketplaces and services
- Stronger coordination with chapter clubs and stamp shows
- New outreach initiatives to prospective collectors

Members will see **more activity, more content, and more opportunities to participate in the APS community.**

2028 – 2029: Growth and Expansion

With core systems in place, APS will focus on expanding its reach and building on growth opportunities.

During this period the Society will:

- Expand education programs and digital resources
- Grow membership through targeted outreach
- Strengthen the role of chapter clubs as community hubs
- Introduce new ways for collectors to engage with philately
- Increase visibility of the hobby in related knowledge communities

This phase focuses on **building momentum and expanding the APS community.**

2030: A Stronger, More Vibrant and More Sustainable Organization

By the end of the strategic plan period, APS aims to achieve:

- Sustainable membership and revenue growth
- Significantly improved financial stability and operational balance
- Modern infrastructure capable of supporting future innovation and growth
- A vibrant and expanding community of collectors

Most importantly, APS will be positioned to ensure that the infrastructure of organized philately continues to thrive for future generations.

APS was built by collectors who believed that philately is more meaningful when pursued together—through shared knowledge, shared discovery, and shared community. This strategic plan continues that tradition while preparing APS to attract and serve collectors in a changing world.

The future of organized philately depends on a strong, vibrant community. This plan is designed to strengthen that community, for today’s members and for generations to come.

2. Organizational Overview



About the American Philatelic Society



Founded in 1886, the American Philatelic Society (APS) is the world's largest nonprofit organization dedicated to stamp and postal history collectors, with members in more than 70 countries. The APS serves collectors, educators, philatelic and academic researchers, and the broader public through a diverse portfolio of philatelic programs, services, and educational resources.

The Society is supported by membership dues, fee-based services, rental income, advertising revenue and member donations.

As of December 31, 2025, APS had 22,601 individual members, 380 chapter club members, and 179 affiliate organizations.

APS Mission Statement

To grow, nurture and empower a thriving community of stamp and postal history collectors across all experience levels.

APS Vision Statement

To be the most trusted, innovative, and valued philatelic organization in the world.

APS Core Values

I. Empowered Accountability

By centering trust and accountability as our foundation, we empower members and employees to succeed.

We are committed to:

- Fostering a flexible environment that enables members and employees to tackle challenges with confidence and autonomy.
- Providing one another with the tools and support to succeed.
- Owning our actions and results, with transparency about successes and setbacks.
- Making mission-driven decisions guided by data and experience.

II. Collaborative Innovation

Together, we innovate to strengthen philately and the APS community we serve.

We are committed to:

- Using collaboration as a catalyst for creative thinking and continuous improvement.
- Being bold, embracing change, and accepting that thoughtful risk-taking is necessary for progress and discovery.
- Exploring emerging trends, technologies, and approaches that can add value to our hobby and organization.
- Expanding our capacity to experiment with and adapt to digital tools and modern technology.

III. Stewardship

We serve as caretakers for the hobby and foster an ecosystem in which organized philately can thrive.

We are committed to:

- Leading the growth and sustainment of organized philately.
- Ensuring strategic and disciplined allocation of Society resources.
- Providing exceptional service and meaningful member experiences.
- Developing partnerships and high-quality resources to cultivate and engage a growing community.

IV. Respect & Care

We honor and celebrate the lived experiences, work, and perspectives of everyone in our community.

We are committed to:

- Practicing active listening and nurturing open lines of communication.
- Cultivating a warm and supportive culture rooted in cooperation and empathy.
- Enabling the many ways people collect, engage in, and enjoy the hobby.

V. Learning & Expertise

We serve the philatelic community as a reliable, accessible source of knowledge, through research, education, and mentorship.

We are committed to:

- Celebrating curiosity and the desire to learn as the building blocks of the hobby.
- Mentoring new collectors and the next generation of experts in the pursuit of skills mastery.
- Facilitating opportunities to create and share knowledge among staff and in the broader community.
- Encouraging staff access to professional development opportunities.



3. Strategic Context



Current Status

Over the past decade, member attrition has exceeded new member acquisition by 37%, resulting in a 27% overall membership decline and a 19% reduction in operational revenue. Age-related attrition remains the primary driver, with 80% of members aged 65 or older as of 2025.

Prior to 2019, APS operated with positive net income; however, that income had been steadily declining due to long-term membership contraction and diminishing participation in revenue generating programs and services. The financial impact of the COVID-19 pandemic in 2020 significantly accelerated this trajectory. APS's real estate operations, which had historically maintained full occupancy, experienced the loss of two major tenants resulting in vacancies that remain to this day. The loss of this rental income, combined with the continued contraction in membership and non-dues revenue, pushed the organization into negative net income.

In response to decades of contraction, APS undertook many years of disciplined cost management and operational restraint to stabilize the organization. These measures, combined with prudent financial stewardship and fundraising activity, enabled the APS to eliminate debt and restore balance to its financial position. Today, the Society is debt-free and in its strongest structural financial position in decades.

However, prolonged austerity and constrained revenue growth limited investment in technology, staffing, and infrastructure. This underinvestment has created technical debt, operational instability, and capacity constraints that have restricted innovation, scalability, and growth.



SWOT Matrix

<p>Strengths</p> <ul style="list-style-type: none">• Engaged member & volunteer community• Trusted national brand and authority in philately• Debt-free position with strategic investment capacity• Best-in-class philatelic library and journal• Scalable revenue-driving programs (Expertizing, Stamp Store, Circuit Sales)• National club and affiliate network• WSP network• Dedicated, committed & capable staff	<p>Weaknesses</p> <ul style="list-style-type: none">• Structural operating deficit• Declining and aging membership• Outdated, fragmented technology stack• Manual and inefficient processes• Limited scalable education offerings• Declining number of experts/mentors• Internal capacity gaps• Stamp show model requires modernization• Limited marketing content & systems• Limited performance analytics and management reporting• International brand
<p>Opportunities</p> <ul style="list-style-type: none">• Large untapped population of non-member collectors• Silver tsunami with disposable income• Digital transformation and systems integration• Scalable e-commerce Stamp Store• Club and WSP show activation as growth engines• Limitless content potential• Strategic partnerships• Experiential stamp show model	<p>Threats</p> <ul style="list-style-type: none">• Membership trajectory• Fraudulent and counterfeit materials in the marketplace• Perception challenges impacting recruitment• Decline in postage stamp usage• Aging core demographic• Competition for attention and leisure time• Macroeconomic concerns• Diminished pipeline of experts/mentors

Transformational Bequest

APS now stands at an important strategic inflection point. Having restored financial stability and eliminated structural debt, the Society is positioned to move from a posture of preservation to one of thoughtful, disciplined advancement.

This progress has been made possible through the extraordinary generosity of APS members and supporters. Over the past several years, the Society has benefited from a wide range of philanthropic contributions—from small-dollar annual donations to larger gifts and bequests made by members who care deeply about the future of the APS and organized philately. These contributions reflect a profound commitment by the APS community to sustain and strengthen the institutions that support the hobby.

Among these gifts, a transformational bequest from Al and Dottie Kugel represents a particularly significant milestone. Their generosity, together with the many other donations and bequests received from members, provides APS with the capacity to make targeted strategic investments that will modernize infrastructure, create the content and expand engagement opportunities, reverse the membership trajectory, and position the Society for long-term financial sustainability.

Philanthropy has long played an essential role in supporting APS programs, services, and educational initiatives. As this strategic plan is implemented, continued support from members and friends of the Society will remain a vital component in enabling APS to invest in innovation, strengthen the infrastructure of organized philately, and ensure that the hobby thrives for generations to come.

The Opportunity

While there is no accurate data on the total number of active stamp collectors in the United States, market indicators demonstrate that the hobby extends far beyond APS's approximately 22,600 individual members. One major national stamp dealer reports more than 100,000 active customers annually—nearly five times the size of APS membership. Additionally, the stamp and postal history categories on eBay are vibrant marketplaces, with tens of thousands of listings and continuous buyer and seller activity at any given time.

The reality is that there is a substantial population of active collectors who are not members of APS. They participate in the marketplace and build collections. And they do so while indirectly benefiting from the infrastructure that organized philately sustains.

This gap represents one of the most immediate and achievable growth opportunities for APS. Converting even a small percentage of these already engaged collectors into members would meaningfully strengthen the Society. To convert these non-member collectors, APS must evolve and better articulate its value proposition and warmly welcome them into the community.

A second opportunity lies within the growing population of retirees and near-retirees. The United States continues to age as the Baby Boomer cohort moves fully into retirement and Generation X begins to enter retirement age in the mid-to-late 2020s. By 2030, approximately one in five Americans will be age 65 or older, with the 65+ population projected to reach roughly 71–73 million.

Many individuals' entering retirement do so with the time, discretionary income, and desire to pursue foregone hobbies. A meaningful share of this demographic is likely to have collected stamps in their youth and maybe even participated in a Ben Franklin Club. Many will be positively predisposed to the hobby.

This "silver tsunami" represents a natural and significant growth opportunity for APS. As more Americans transition into retirement, they seek activities that provide both stimulation and social connection. Philately and the APS offer both. The opportunity with this segment lies in visibility, creating awareness of the APS community and programs, and providing simple, relevant, and engaging on-ramps into organized philately.

Beyond active collectors and retirees, APS's greatest long-term growth opportunity lies within what can be described as the "philatelic-adjacent" audience. These are individuals whose interests naturally intersect with stamps and postal history.

Across the United States, millions of people of all ages engage deeply with history, geography, genealogy, art, design, military history, transportation, politics, science, and global culture. They consume historical media, visit museums, build family trees, research travel destinations, and immerse themselves in niche knowledge communities.

Organized philately offers something uniquely powerful to this audience: tangible artifacts of history, global storytelling expressed through miniature works of art, and an engaging, well-structured community for deeper exploration and shared discovery. The opportunity is not to generate curiosity or interest. It is to connect existing curiosity and interest with the distinctive value proposition that organized philately and APS provide.

4. Strategic Priorities / Pillars



This plan sets the American Philatelic Society's strategic focus for 2026–2030. It builds the infrastructure, produces the content, and creates the engagement opportunities necessary to reach the aforementioned growth audiences. It also develops the organizational culture and financial stability required to ensure a vibrant and sustainable future for organized philately and the APS.

To ensure strategic and operational focus, all initiatives outlined in the Operations Plan will align with at least one of the following strategic priorities.

1. Achieve Operational Excellence

Strategic Imperative

To fulfill its mission, APS must operate with systems and processes that are efficient, scalable, data-driven, and resilient. Years of financial constraint limited investment in technology and operational infrastructure. As a result, manual processes, fragmented systems, and limited reporting capabilities have created technical debt, operational inefficiencies and limited visibility into program level performance. Addressing these constraints is foundational to every strategic initiative.

Over the next five years, APS will undertake a disciplined technological and operational transformation.

Strategic Focus

- Modernize and integrate core technology platforms
- Automate manual, paper-based, and redundant processes
- Enhance and redesign the APS website to improve usability, content delivery, engagement opportunities, and overall user experience
- Establish integrated data systems to support real-time performance reporting and decision-making
- Implement and document standardized operating procedures (SOPs) across all departments
- Develop a performance dashboard aligned with enterprise goals and operational objectives

Intended Outcome

Operational excellence is about clarity, consistency, and using technology to free staff and volunteers from inefficiency so they can focus on mission-critical work that drives growth and member value.

Operational excellence is essential to enabling APS to confidently execute its broader strategic ambitions. It will provide the infrastructure, systems, and processes necessary to execute effectively, evaluate success, scale high-performing initiatives, and strengthen financial oversight and management reporting.

2. Establish APS as the Leader in Philatelic Content

Strategic Imperative

Philately is built on knowledge. Research, storytelling, scholarship, and education form the intellectual backbone of organized philately.

APS will position itself as the definitive source of trusted, accessible, and engaging philatelic content in both traditional and digital formats.

Strategic Focus

- Significantly expand educational content and programming across multiple formats and experience levels, while optimizing delivery and engagement through the Learning Management System
- Leverage the American Philatelist (AP), Philatelic Literature Review (PLR), American Philatelic Research Library (APRL), Learning Management System (LMS) and expert networks to create scalable knowledge assets
- Leverage the limitless content potential inherent in stamps and postal history to produce compelling multimedia “edutainment” content that engages the curiosity of prospects
- Create structured learning pathways for beginners, intermediate collectors, and advanced specialists to ensure a pipeline of new members and experts to sustain the infrastructure of organized philately

Intended Outcome

Content will be a primary driver of engagement, recruitment, and retention. By becoming the leading curator and producer of philatelic content, APS strengthens its value proposition to current members and prospective members alike.

3. Build Engaging On-Ramps to the APS Community

Strategic Imperative

The long-term vitality of APS depends on building clear, welcoming, and compelling pathways into organized philately and the APS community. These pathways must be both digital and experiential, and leverage technology to capture leads, nurture interest with relevant content, and convert prospects into members.

Strategic Focus

APS will design intentional on-ramps that:

- Convert active non-member collectors into APS members
- Engage and convert prospects with experiential entry points that leverage APS chapter clubs, APS affiliate organizations, and stamp shows
- Connect history, genealogy, art, thematic and other relevant interest to philately and philatelic education content

- Modernize the stamp show experience to make it more experiential and discovery-driven
- Optimize the first-year member journey to increase awareness of and participation in APS programs and services

Intended Outcome

A highly engaged membership base that drives non-dues revenue, alongside professional, relevant, and engaging on-ramps that welcome new prospects and generate sustained new member applications.

4. Cultivate a High-Performance, Mission-Driven Culture

Strategic Imperative

APS's success ultimately depends on its people—staff, board members, volunteers, and APS community thought leaders.

This strategic priority balances two equally important commitments:

- Building a culture of accountability, ownership, and measurable performance
- Creating an empathetic, service-oriented, and fulfilling workplace that attracts and retains exceptional talent

Strategic Focus

- Well defined roles, responsibilities, and decision-making authority
- Structure and staff the team to succeed
- Align individual performance plans with strategic priorities
- Invest in professional development and leadership training
- Strengthen volunteer engagement structures
- Reward initiative, service, collaboration, and innovation
- Foster an environment where curiosity, respect, and core values alignment guide behavior
- Provide flexibility and respect work-life balance

Intended Outcome

A strong performance culture is not corporate rigidity. It is clarity of purpose, shared expectations, and pride in shared achievements. APS will professionalize its operations while cultivating a collaborative, mission-driven environment that attracts and retains talented individuals who find purpose in service and in APS's mission.

5. Achieve Financial Sustainability

Strategic Imperative

Although APS has eliminated structural debt and restored balance to its financial position, membership contraction and revenue pressures remain structural risks. Financial sustainability requires strategic investment to grow membership and revenue, coupled with disciplined expense management.

Strategic Focus

- Reverse membership declines and grow dues revenue
- Optimize, promote, and expand scalable non-dues revenue-generating programs
- Maintain business development income at or above the prior three-year average
- Improve real estate performance and asset utilization
- Increase advertising income
- Implement data-driven financial forecasting and performance-focused management reporting that aligns resource allocation with strategic impact

Intended Outcome

Financial sustainability is not an end in itself. It enables APS to invest confidently in innovation, infrastructure, and growth, and to execute its mission effectively and sustainably.



5. Outcomes & Growth Framework



While the five strategic priorities define where APS will focus its efforts, the Society’s long-term success must ultimately be measured by clear enterprise-level outcomes. The following enterprise goals and growth model articulate the measurable results this plan is designed to achieve.

Enterprise Goals

Membership

Achieve sustained growth in active APS membership, targeting an average annual increase of 5%.

Non-Dues Revenue

Achieve an increase in non-dues revenue from core services—including Circuit Sales, Stamp Store, and Expertizing—by a real average of 5% annually.

Financial Sustainability

Achieve structural break-even operations, with revenues meeting or exceeding expenses by December 2032, enabling continued reinvestment in APS’s mission and growth.

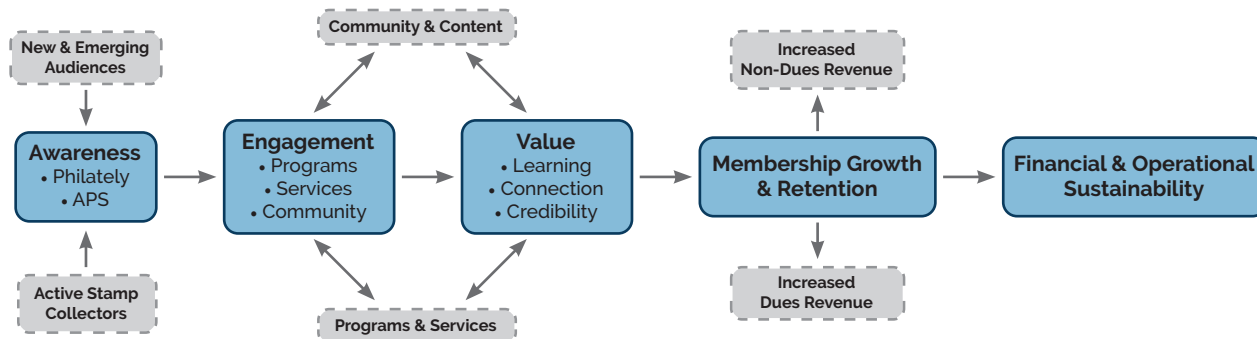
APS Growth and Sustainability Model

The APS strategic plan is grounded in a value-driven growth model that connects awareness, engagement, member value, and long-term financial and operational sustainability.

The model recognizes that short-term membership growth requires increasing awareness of the Society and its services among non-member active collectors; while long-term membership growth and sustainability depends on expanding awareness of APS and philately as a hobby among lapsed, new and emerging collector audiences.

Awareness creates opportunities for engagement through APS programs, services, community, and content. Engagement and value reinforce one another—deepening learning, connection, and credibility for members and prospective members. As APS’ value proposition increases, so do membership growth and retention.

Membership growth and retention generate increased dues revenue and expanded participation in non-dues revenue-generating programs and services. Together, these revenue streams support long-term financial and operational sustainability, reinforce APS’ position as the trusted institutional leader within the philatelic community, and enable APS to fulfill its mission for generations to come.



APS Strategic Growth and Sustainability Model

6. Monitoring & Evaluation



The success of this strategic plan depends not only on execution, but on disciplined measurement, transparency, and course correction. APS is committed to establishing a structured performance monitoring framework that enables leadership to track progress, identify emerging risks, and make informed adjustments over time. The APS will produce a bi-annual report that showcases progress against goals and objectives.

Key performance indicators (KPIs)

Enterprise Goals and the Core Function initiatives in the Detailed Operations Plan will be monitored through a defined set of Key Performance Indicators (KPIs) aligned to the APS Strategic Growth and Sustainability Model. At a minimum, KPIs will include measures related to:

- Member engagement (digital, educational, and in-person participation)
- Active membership growth and retention
- Dues revenue and non-dues revenue performance
- Program-level financial performance (e.g., APEX, Circuit Sales, Stamp Store)
- Operational efficiency and service turnaround times
- Technology adoption and system performance
- Financial sustainability (net income, cash flow, reserve levels)

Within 90 days of board approval of this strategic plan, APS leadership will design and implement an initial KPI dashboard framework. This dashboard will:

- Define each KPI clearly and consistently
- Identify available data sources
- Establish baseline values for all KPIs where current data is accessible
- Identify data gaps requiring system enhancement or new data collection processes to make the data available

The absence of baseline data in several areas is acknowledged. In some cases, required metrics will only become available following implementation of upgraded systems and integrated reporting tools described in the Operations Plan. Where baseline data is not currently available, APS will document interim proxy measures and define a roadmap for full data capture.

Data Sources and Systems Integration

At present, APS data resides across multiple legacy systems with limited integration. As part of the Technology & Innovation initiatives outlined in the Operations Plan, APS will modernize its business systems and digital platforms to enable more automated, accurate, and timely reporting.

Over time, KPI reporting will transition from partially manual data compilation to increasingly automated dashboard reporting integrated across membership, finance, sales, expertizing, stamp show, library, education and digital platforms. This phased approach will ensure that monitoring improves as infrastructure improves.

7. Risk Management & Assumptions



Execution of this strategic plan requires disciplined sequencing, financial stewardship, sustained organizational focus and cultural alignment. While the plan is grounded in realistic assumptions and phased implementation, APS acknowledges that risk management must be proactive, transparent, and ongoing.

This section outlines the principal strategic risks, key assumptions underlying the plan, and APS's approach to mitigation and contingency planning.

Key Strategic Risks and Mitigation Framework

I. Membership Growth Risk

The enterprise goals target an average annual 5% increase in active membership. If conversion of non-member collectors, retirees, and philatelic-adjacent audiences does not materialize at projected levels, revenue growth and break-even timelines may be delayed.

Mitigation:

- Experimental acquisition campaigns with phased marketing automation and proof of concept validation before meaningful investment of time or resources
- Focus on engagement metrics, not just membership applications, to gather leads and build an acquisition pipeline
- Early KPI tracking of prospect-to-member conversion ratios
- Structured onboarding journeys to improve first-year retention and engagement
- Regular review and adjustment of value proposition messaging

Member acquisition and net growth will be monitored quarterly, with corrective and optimizing adjustments to marketing, content, or journeys as necessary.

II. Technology Implementation & Integration Risk

Many strategic initiatives depend on successful modernization of technology systems such as the Customer Relationship Management System (CRM), website, e-commerce, accounting, expertizing/circuit sales platforms. Delays, cost overruns, vendor performance issues, or integration challenges could disrupt timelines.

Mitigation:

- Extensive requirements gathering, involving internal and external stakeholders
- Detailed Requests For Proposals (RFPs) and competitive review processes involving the Technology & Innovation Task Force
- Clear scope definition and milestone-based vendor contracts

- Staggered sequencing of major system launches
- Use of proven, sustainable, off-the-shelf platforms where feasible
- Internal and external change management communications before system launches

Technology investments will be evaluated through measurable Return on Investment (ROI) and operational efficiency gains before subsequent phases are authorized.

III. Financial & Investment Risk

The plan assumes strategic reinvestment capacity supported by disciplined use of reserves, improved dues and non-dues revenue, and stable fundraising. Underperformance in revenue or macroeconomic disruption could constrain available capital.

Mitigation:

- Phased investment tied to proof of concept when feasible (e.g., Circuit Sales chain-of-custody achieved before system upgrade)
- Five-year financial forecasting reviewed annually
- Conservative revenue assumptions in early years
- Maintenance of defined reserve thresholds
- Active oversight by the Joint Finance & Audit Committee (JFAC)

Investments will be prioritized based on strategic necessity, projected return, and sequencing dependencies identified in the Operations Plan. No major capital deployment will proceed without board-level review.

IV. Organizational Capacity & Change Fatigue

The plan includes a significant volume of initiatives across departments. Even with phased sequencing, organizational capacity constraints or change fatigue could impact execution quality.

Mitigation:

- Clear prioritization under the five Strategic Pillars
- Alignment of staff performance plans directly to strategic metrics
- Annual operational planning that confirms capacity alignment
- Reintroduction of performance-based incentives
- Monthly townhalls to monitor progress towards goals, celebrate achievements and detect capacity concerns early

The enterprise goals do not depend on flawless execution of every initiative, but on sustained forward momentum and disciplined prioritization.

V. Cultural & Member Sentiment Risk

Certain initiatives may generate concern among segments of the staff and/or membership who prefer traditional approaches.

Mitigation:

- Clear communication that innovation complements tradition
- Early engagement of Task Forces and members in planning and requirements gathering stages
- Formal business-case evaluation before adoption of culturally sensitive initiatives
- Member sentiment surveys for major directional decisions
- Continued support and investment in legacy programs alongside modernization efforts APS will prioritize transparency and incremental evolution rather than abrupt or surprise transformation.

VI. External & Market Risk

Broader threats identified in the SWOT—including demographic aging, continued decline in postage usage, counterfeiting in the marketplace, and competition for attention—remain external pressures.

Mitigation:

- Diversification of revenue beyond dues
 - Continuous focus on the value proposition
 - Focus on engaging on-ramps to provide experiences and knowledge
 - Leveraging the APS Code of Conduct to protect marketplace integrity
 - Continued positioning of APEX as a trust anchor in the marketplace
- While APS cannot control macro trends, it can strengthen its resilience and relevance within them.

Critical Assumptions

This strategic plan is built on several core assumptions:

- There is sufficient untapped demand among active non-member collectors, retirees, and philatelic-adjacent audiences.
- Modernized systems and automation will unlock staff capacity, improve efficiency, enable increased engagement, and enhance member experience.
- Content and community will drive engagement and conversion.
- Operational integrity and performance management will increase organizational effectiveness.
- Financial sustainability by 2030 is achievable if membership and non-dues revenue targets are met and expenses remain aligned with growth.

These assumptions will be revisited annually as part of the Monitoring & Evaluation framework.

Dependency Management

Several initiatives are contingent upon successful completion of critical dependencies:

- Numerous growth and marketing initiatives depend on the successful and timely completion of the website redevelopment, including engagement functionality, lead capture, and integrated data reporting.
- Efficiency gains, performance monitoring and management reporting depend on successful systems integration.
- Some initiatives are dependent on the completion and approval of a formal business case.
- Some initiatives such as Circuit Sales system update depend on proof-of-concept precursors.
- Sustaining or expanding planned staffing levels is contingent upon revenue performance and financial sustainability targets.

This staged decision-making model reduces financial and operational risk by preventing premature capital deployment.

Contingency Planning & Adaptive Governance

APS will review progress against enterprise goals and major initiatives at least bi-annually, with quarterly executive review of KPI dashboards once implemented.

If performance materially diverges from plan, APS leadership may:

- Reprioritize or pause lower-impact initiatives
- Extend implementation timelines
- Adjust revenue strategies or pricing models
- Modify staffing or vendor commitments
- Re-sequence capital investments
- Increase or decrease investments to scale high-performing initiatives or back away from low-performing initiatives

The strategic plan is designed as a disciplined roadmap, not a rigid script. Adaptive governance ensures responsiveness and course correction as needed without sacrificing strategic direction or intended outcomes.

Risk Culture Commitment

This strategic plan represents a healthy and strategic appetite for well-managed risk in pursuit of meaningful reward. Risk management at APS will not discourage innovation. Rather, it will ensure that innovation is disciplined, data-informed, and aligned with mission, strategy, and capacity.

The APS commits to:

- Treat the Society's financial reserves as precious assets to be utilized judiciously.
- Take thoughtful, measured risks when justified.
- Protect financial stability and institutional credibility
- Communicate transparently with stakeholders
- Maintain stewardship over member trust and resources

By pairing ambition with accountability, APS will pursue growth while safeguarding the long-term health of organized philately.

8. Financial & Resource Alignment



Successful execution of this Strategic & Operations Plan requires careful alignment between strategic priorities, financial resources, staffing capacity, and capital investment planning. The purpose of this section is to demonstrate how APS will allocate resources to implement the initiatives outlined in the Operations Plan and achieve financial sustainability by December 2033, while maintaining a minimum balance of \$1.25 million cash reserves in the Campaign for Philately.

Multi-Year Forecast - APS

	2026 Amendment	2027 Forecast	2028 Forecast	2029 Forecast	2030 Forecast	2031 Forecast	2032 Forecast
Dues Income	812,900	833,223	891,548	940,583	992,315	1,041,931	1,094,028
Other Income	2,557,796	2,636,842	2,783,609	2,897,072	3,014,986	3,116,959	3,223,281
Transfers	206,879	206,879	206,879	206,879	206,879	206,879	206,879
Business Development (Donations)	450,000	450,000	450,000	450,000	450,000	450,000	450,000
Total Income	4,027,574	4,126,943	4,332,036	4,494,533	4,664,180	4,815,769	4,974,187
Personnel Costs	2,418,551	2,624,919	2,686,791	2,780,829	2,878,158	2,978,893	3,083,155
Other Exp except Deprec. & Amort.	1,762,111	1,881,944	1,879,444	1,879,444	1,879,444	1,879,444	1,879,444
Subtotal	4,180,662	4,506,863	4,566,235	4,660,273	4,757,602	4,858,338	4,962,599
Income before Deprec. & Amort.	(153,088)	(379,921)	(234,200)	(165,740)	(93,422)	(42,569)	11,588
Depreciation and Amortization	150,554	442,112	411,537	316,816	11,774	0	0
Operating Net Income / (Loss)	(303,642)	(822,033)	(645,737)	(482,556)	(105,197)	(42,569)	11,588

Personnel Costs represent the same FTE count as the original 2026 approved budget and the addition of up to two paid interns beginning in 2026. The annual increase in personnel costs reflects an average salary increase of 3.5% to fund cost of living and merit increases. Depreciation expenses reflect a 5-year amortization schedule for hardware, and a 3-year amortization schedule for software.



Multi-Year Forecast – APRL

	2026 Amendment	2027 Forecast	2028 Forecast	2029 Forecast	2030 Forecast	2031 Forecast	2032 Forecast
Rental Income & Reimbursements	639,513	753,834	753,834	753,834	753,834	753,834	753,834
Other Income	312,007	312,007	312,007	312,007	312,007	312,007	312,007
Transfers	239,926	239,926	239,926	239,926	239,926	239,926	239,926
Total Income	1,191,446	1,305,767	1,305,767	1,305,767	1,305,767	1,305,767	1,305,767
Personnel Costs	278,233	286,580	296,610	306,992	317,736	328,857	340,367
Other Exp except Deprec. & Amort.	954,117	979,117	979,117	979,117	979,117	979,117	979,117
Subtotal	1,232,350	1,265,697	1,275,727	1,286,109	1,296,853	1,307,974	1,319,484
Income before Deprec. & Amort	(40,904)	40,070	30,039	19,658	8,913	(2,207)	(13,717)
Depreciation and Amortization	434,154	455,097	455,097	455,097	455,097	455,097	455,097
Operating Net Income / (Loss)	(475,058)	(415,027)	(425,058)	(435,439)	(446,184)	(457,305)	(468,815)



CAPEX Plan

APS Capital Expenditures			Depreciation Cycle				
Description	Delivery Date	Amount	2026	2027	2028	2029	2030
Website & Ecommerce Phase 1 2026	Oct-26	450,000	37,500	150,000	150,000	112,500	
Website & Ecommerce Phase 2 2027	Apr-27	190,000		63,333	63,333	63,333	
Internet Sales (Big Comm setup)	Oct-26	7,500	625	2,500	4,375		
Expert. & CS 2026 inc data migration 53k	Aug-27	275,000		91,667	91,667	91,667	
Single Sign on setup costs	Oct-26	18,500	1,542	6,167	6,167	4,625	
Hubspot Implementation	Oct-26	25,000	2,083	8,333	8,333	6,250	
IMIS Implementation	Jun-26	100,000	16,667	33,333	33,333	16,667	
Data Migration Classic	Jan-27		-	-	-		
Restful API	Mar-26	20,000	5,000	6,667	6,667	1,667	
Accounting Software	Dec-26	100,000	8,333	33,333	33,333	25,000	
Staff computers and laptops	Mar-26	4,800	480	960	960	960	960
Travel computers	Mar-26	3,000	450	600	600	600	600
Firewall & Server	Jul-26	6,800	680	1,360	1,360	1,360	1,360
		1,200,600	73,360	398,253	400,128	324,629	2,920

APRL Capital Expenditures			Depreciation Cycle				
Description	Delivery Date	Amount	2026	2027	2028	2029	2030
Bldg 18 roof	Jun-26	614,000	7,675	15,350	15,350	15,350	15,350
Alarm replacement	Jan-27	57,000	-	1,462	1,462	1,462	1,462
		671,000	7,675	16,812	16,812	16,812	16,812

Campaign for Philately - Cash Reserves

	2026 Amendment	2027 Forecast	2028 Forecast	2029 Forecast	2030 Forecast	2031 Forecast	2032 Forecast
Beginning Balance	3,536,965	2,769,877	2,389,957	2,155,757	1,990,017	1,896,595	1,854,026
Donations	450,000	450,000	450,000	450,000	450,000	450,000	450,000
Transfers to General Fund	(1,217,088)	(829,921)	(684,200)	(615,740)	(543,422)	(492,569)	(438,412)
Ending Balance	2,769,877	2,389,957	2,155,757	1,990,017	1,896,595	1,854,026	1,865,614



9. Detailed Operations Plan



Introduction

The goals and objectives in this detailed operations plan are intentionally integrated and mutually reinforcing, ensuring that every initiative advances APS's mission, strengthens membership, and builds long-term organizational resilience.

The initiatives outlined in this section are the product of extensive engagement with seven APS Task Forces comprised of volunteer subject-matter experts from across the philatelic community, as well as input from APS staff, APS and APRL boards and individual members. As such, these initiatives reflect both the priorities of the APS community and the practical operational realities that must be addressed to strengthen organizational ability to innovate, execute and scale operations effectively.

Readers will encounter only a few brand-new or highly disruptive concepts within this section. That is intentional. Many of the ideas captured here have circulated within the APS community for years without being executed. This strategic plan provides structure, accountability, and sequencing—ensuring that worthy concepts now have clearly defined objectives, responsible parties, and target timelines. The emphasis of this Operations Plan is not on novelty, but on disciplined execution and operational focus.

The initiatives have been staggered over time to reflect realistic staff capacity and to account for critical dependencies among technology, staffing, and infrastructure improvements. While every effort has been made to establish achievable timelines, APS recognizes that not all objectives will be met precisely as scheduled. Circumstances evolve, priorities shift, and some initiatives will exceed expectations while others may require course correction. The Enterprise Goals outlined in Section 4 do not depend on the flawless completion of every initiative; rather, they depend on building and sustaining positive forward momentum, strategic focus, and accountability across the organization.

At first glance, the volume of initiatives in this section may appear ambitious. It is important to recognize that many of these initiatives are not entirely new undertakings. Several are already underway or represent refinements of ongoing operational work, while others have been intentionally paused until their role in this strategic plan was confirmed. They are included here to ensure clarity of purpose, defined accountability, measurable success criteria, and proper sequencing within the broader strategic framework. The intent is not to overload the organization, but to align and formalize work that is essential to achieving APS's enterprise goals.



Core Function: Technology & Innovation



Technology & Innovation is the foundational enabler of APS’s strategic plan. Modern, integrated systems are essential to improving member experience, creating opportunities for positive engagement, delivering relevant content, increasing operational efficiency, strengthening data-driven decision-making, and scaling revenue-generating programs.

Constrained investment over many years has resulted in outdated technology, fragmented systems, manual workflows, and limited reporting capabilities. Addressing this technical debt is not simply an IT upgrade. It is a strategic imperative that underpins nearly every initiative in this plan.

The initiatives in this section focus on modernizing core platforms, integrating previously siloed systems, automating manual processes, and establishing scalable infrastructure that allows APS to operate as a high-performing, digitally enabled organization prepared for long-term growth and sustainability.

I. Automated Marketing Software

Status: APS currently lacks integrated marketing automation capabilities to systematically capture leads, nurture prospects, and track campaign performance and conversions.

Objective: By May 2026, procure and integrate an automated marketing software solution.

Responsibility: Technology & Innovation Director (Lead), Marketing Manager

Success Metrics:

- Lead capture functionality operational and integrated across website & campaigns
- Automated nurture journeys deployed for at least three segmented audiences within 60 days of launch
- Near real-time dashboard reporting on campaign performance and conversion rates
- Achieve a 2.5% prospect-to-member conversion within 24 months

Strategic Priority Alignment:
1, 3, 4, 5



II. Website

Status: Stamps.org operates on a legacy .NET technology DNN platform that is not mobile responsive and requires significant third-party intervention to add routine engagement opportunities or make basic layout adjustments or design updates.

Objective: By December 15, 2026, launch a modern, mobile-responsive, community-centered website with integrated single sign-on and seamless access to APS digital platforms.

Responsibility: Director of Technology & Innovation (Lead)

Success Metrics:

- 100% mobile-responsive design across all primary pages
- Single sign-on operational across core APS digital platforms
- 20% increase in average session duration within 12 months
- 15% increase in authenticated member portal utilization within 18 months
- 10% increase in new member applications originating from website traffic within 18 months

Strategic Priority Alignment:
1, 3, 4, 5



III. E-Commerce Platform Modernization

Status: Stamp Store does not currently leverage APS’s Code of Ethics as a differentiating trust advantage in the marketplace and produces no organic search traffic to stamps.org.

Objective: By 1 April 2027, launch a robust and fully integrated, off-the-shelf, ecommerce solution that supports direct sales, consignment sales and customer-to-customer (C2C) sales and provides a best-in-market philatelic material search experience.

Responsibility: Director of Technology & Innovation (Lead), Director of Sales & Fulfillment

Success Metrics:

- Fully integrated e-commerce platform operational by target date
- 20% increase in organic search traffic to Stamp Store within 12 months
- 20% increase in total e-commerce revenue within 36 months of launch
- Expansion to support direct, consignment, and C2C transactions

Strategic Priority Alignment:
1, 4, 5



IV. Expertizing and Circuit Sales Solution Update

Status: APS's current bespoke sales and expertizing systems are over 20 years old, require substantial manual intervention, and present significant scalability and security limitations.

Objective: By 1 August 2027, launch fully integrated, secure and streamlined solutions for the administration of expertizing and circuit sales services.

Responsibility: Director of Technology and Innovation (Lead), Director of Sales & Fulfillment, Expertizing Director

Success Metrics:

- Optimally digitized intake, tracking, and fulfillment workflow
- Reduction in manual administrative touchpoints decreasing average processing time by 30%
- Real-time status visibility for submitters and experts
- 10% increase in expertizing and circuit sales volume within 24 months

Strategic Priority Alignment:
1, 5



V. Accounting Software Upgrade

Status: APS's current accounting software operates on an on-site server, is several versions behind current releases, and is not integrated with the membership software or other core operational systems.

Objective: By December 2026 implement a modern, cloud-based, integrated accounting and financial

management system that supports automated workflows, real-time reporting, enhanced financial transparency, and improved management reporting capabilities.

Responsibility: CFO (Lead), Director of Technology & Innovation

Success Metrics:

- New accounting platform implemented and fully operational by target date
- Optimal integration with the tech stack to minimize manual processes
- 50% reduction in manual reconciliation and journal entry processes
- Monthly financial close completed within 15-20 days
- Real-time financial dashboards available to executive leadership

Strategic Priority Alignment:

1, 4, 5



VI. Philatelic Artificial Intelligence (AI) Exploration

Status: Advances in artificial intelligence, particularly large language models (LLMs), are reshaping research, search, and knowledge access across many disciplines. AI tools are already influencing aspects of philatelic research, content creation, and digital engagement. Regardless of the pace or direction of adoption within APS, artificial intelligence will likely play an increasingly significant role in the broader future of philately.

This emerging shift presents both opportunity and risk. By proactively evaluating AI capabilities, APS can position itself to help shape how such technologies are applied within the hobby—ensuring that any future use aligns with the core principles of philatelic scholarship, authenticity, and expert judgment. APS has not yet conducted a formal assessment of how AI technologies could responsibly support its mission while maintaining the integrity and standards that define organized philately.

Objective: By June 2026, establish a cross-functional AI Task Force and complete a comprehensive business case evaluating the feasibility, risks, governance requirements, and potential use cases of a closed, citation-based philatelic AI capability grounded in APS and APRL content. The business case will outline strategic options, cost implications, member sentiment considerations, and recommended next steps, without committing APS to implementation.

If the evaluation supports further development, APS will explore the feasibility of pursuing the initiative in collaboration with qualified academic partners such as Penn State University—leveraging institutional expertise in artificial intelligence and applied research. Where appropriate, APS would seek to structure the project as a supervised academic research collaboration to ensure technical rigor, governance discipline, and responsible implementation.

Responsibility: Director of Technology & Innovation (Lead); Digital Librarian; Director of Education

Success Metrics:

- AI Task Force established by target date
- Member sentiment survey conducted regarding AI use in APS programs
- Draft AI governance and content policy framework developed
- Environmental scan of AI use in comparable nonprofit, research, or heritage institutions completed
- Defined potential use-case categories (e.g., research support, metadata assistance, educational guidance)
- Risk assessment completed, including copyright, liability, and reputational considerations
- Comprehensive business case delivered to Executive Leadership and Board by March 2027
- Board-level discussion and formal determination of next steps within 90 days of business case submission

Strategic Priority Alignment:

2, 3



Core Function: Education



Education is central to APS’s mission and its long-term growth strategy. High-quality, accessible, and engaging educational programming and content strengthens member value, deepens engagement, and cultivates the next generation of collectors, exhibitors, experts, and volunteer leaders.

APS has historically offered meaningful educational opportunities, but offerings have been fragmented and not fully aligned to a structured learning progression pathway. The initiatives in this section are designed to build a cohesive, scalable education ecosystem—integrating digital learning and engagement content, in-person instruction, curated partner content, and community engagement.

By strengthening both foundational curricula and experiential learning opportunities, APS will reinforce its authority as a knowledge leader in philately while driving sustained membership growth and retention.

I. Philatelic Curricula

Status: APS currently lacks high-quality, contemporary, evergreen philatelic curricula that provide a structured and engaging introduction to beginning and intermediate collectors. These foundational courses are essential to activating entry-level hobbyists within APS’s Learning Management System (LMS) (StampSCHOOL) and nurturing their progression into the APS community and organized philately.

Objective: By August 2026, release an introductory teaser module for the Introduction to Philately course to begin audience activation and market testing. By November 2026, release a second teaser module to build momentum and collect user feedback. By January 2027, launch the complete multi-module Introduction to Philately course; and by June 2027, expand APS’s StampSCHOOL offerings by adding an Intermediate Philately course.

Responsibility: Director of Education (Lead)

Success Metrics:

- Teaser modules released in August and November 2026
- Full Introduction to Philately course launched by January 2027
- Intermediate Philately course launched by June 2027
- Minimum of 250 full-course enrollments within 12 months of launch of each full-course
- Target 40% course completion rate
- Minimum 5% conversion of non-member participants to APS membership within 12 months

Strategic Priority Alignment:

2, 3

II. In-Person Education

Status: APS suspended in-person educational programming during COVID and has not yet resumed. In-person instruction plays a critical role in fostering mentor relationships, cultivating subject-matter expertise, and developing the next generation of philatelic leaders, exhibitors, and volunteer experts.

Objective: By August 2026, develop and approve a comprehensive action plan to relaunch on-site Summer Seminar education programming at APS headquarters and to pilot on-the-road in-person education programming in partnership with World Series of Philately (WSP) shows. To the extent practical considering concurrent courses and limited videography capacity, priority content courses will be recorded and made available through APS’s Learning Management System (StampSCHOOL) to extend reach and long-term educational value.

Responsibility: Director of Education (Lead)

Success Metrics:

- Action plan completed and approved by August 2026
- Summer Seminar and On-The-Road courses launch in Summer 2027
- Minimum of 60 in-person Summer Seminar students in first year of relaunch
- On-the-road pilot successfully conducted at GASS 2027, achieving at least 75% of intended class size attendance for each class
- Recorded sessions uploaded to StampSCHOOL and promoted in APS Newsletter within 90 days of launch
- In-person education participant satisfaction rating of 80% or higher
- Minimum 15% of participants engage in additional APS education programs within 12 months

Strategic Priority Alignment:

2, 3



III. Scout Merit Badge

Status: APS currently lacks a standardized, turnkey course presentation to support Scouting America Stamp Collecting Merit Badge workshops. While local Scout leaders seek structured, engaging programming to facilitate merit badge achievement, APS does not have a coordinated national relationship with Scouting America, consistent engagement with local councils in WSP host cities, or a formal roster of trained merit badge counselors to deliver workshops at scale.

WSP stamp shows present a strategic opportunity to introduce young participants to philately and APS membership through structured, high-quality merit badge programming.

Objective: By February 2027, develop a structured, hands-on Stamp Collecting Merit Badge course presentation and instructor toolkit. In parallel, establish formal engagement with Scouting America at the national level, build relationships with local scouting councils in WSP event host cities, and develop a roster of trained and certified merit badge counselors to sustainably facilitate and deliver workshops at WSP shows.

Responsibility: Director of Education (Lead)

Success Metrics:

- Course presentation and instructor toolkit completed by February 2027
- Instructor training guide developed and distributed by February 2027
- Workshops offered at 4 WSP stamp shows in 2027
- National roster of trained and certified stamp collecting merit badge counselors established by May 2028
- Partnerships established with local scouting councils and workshops offered at 50% of WSP host cities by 2030

Strategic Priority Alignment:
2, 3

IV. The HUB Community Discussion Board

Status: The HUB launched in summer 2025. While the platform has established a solid foundation for community interaction, participation and engagement levels indicate significant opportunities for growth and broader utilization among APS members and prospective members, as well as by APS staff.

Objective: By December 2028, increase registered HUB participants by 40% and materially improve engagement levels, positioning the HUB as a central platform for ongoing member interaction, peer learning, and prospect conversion.

Responsibility: Director of Education (Lead)

Success Metrics:

- 20% increase in registered HUB participants by December 2027
- 15% increase in average posts per month and 10% increase in average engagements (comments + reactions) per post by February 2028
- 80%+ participant satisfaction rating

Strategic Priority Alignment:

2, 3

V. Webinar Series

Status: The philatelic community produces substantial webinar content across APS affiliates and partner organizations, and many global subject-matter experts are willing to contribute. However, APS has not conducted a formal audit of existing webinar assets or systematically assessed member demand to identify content gaps and coordination opportunities. Additionally, there is no centralized, curated repository within StampSCHOOL to organize and preserve webinar content for ongoing access.

This presents an opportunity to develop a demand-driven webinar strategy that curates existing content, fills high-interest gaps, and builds a lasting educational asset library.

Objective: By December 2026, complete an audit of existing APS and partner webinar assets and conduct a member interest assessment to identify high-demand topics and content gaps. Based on findings, develop and implement a coordinated, recurring APS webinar program and establish a curated, searchable webinar repository of high-quality webinars within StampSCHOOL to provide ongoing access to recorded sessions.

Responsibility: Director of Education (Lead)

Success Metrics:

- Webinar content audit completed by target date, and member interest survey completed within 60 days of the content audit
- Strategic webinar plan approved by target date

- Average attendance of 50+ participants per webinar
- 50% of attendees participate in more than one webinar annually
- Curated webinar repository launched within StampSCHOOL by March 2027
- 5% of non-member attendees convert to APS membership within 12 months
- 80%+ participant satisfaction rating

Strategic Priority Alignment:

2, 3

VI. Philatelic Exhibiting Best Practices

Status: The pipeline of competitive exhibitors is gradually declining. While APS provides formal exhibit guidelines, members often seek practical guidance and inspiration on how to transform collections into compelling, competitive exhibits.

Objective: By August 2027, produce and publish a helpful guide to exhibiting that emphasizes storytelling, presentation, and philatelic knowledge, while generating increased enthusiasm for competitive exhibiting and participation in APS-sanctioned WSP shows.

Responsibility: Director of Education (Lead), Director of Expertizing



Success Metrics:

- Determine interest and confirm partnership with the American Association of Philatelic Exhibitors (AAPE) by December 2026
- Video produced and published by August 2027
- Achieve 3,000 video views by 2030
- 5% increase in first-time exhibit applications within two years
- Positive feedback rating of 80%+ from viewers

Strategic Priority Alignment:

2, 3



VII. Curated Third-Party Education Content Portal

Status: High-quality philatelic educational content exists across affiliate and partner organizations, but it is fragmented and often underutilized due to discoverability challenges.

Objective: By October 2027, launch a curated stamps.org page/portal that aggregates and organizes best-in-class third-party philatelic educational resources into a centralized, searchable hub.

Responsibility: Director of Education (Lead), Director of Technology & Innovation, Marketing Manager

Success Metrics:

- Portal launched by August 2027
- 5,000+ portal page views within first 12 months
- 2,000+ click-throughs to partner content annually

Strategic Priority Alignment:

2, 3



VIII. Young Philatelic Leaders Fellowship (YPLF)

Status: The YPLF is a well-regarded student fellowship program that has operated successfully since 2010, producing 3–5 fellows annually. While the program effectively mentors participants during their fellowship year, APS does not currently maintain a structured alumni engagement strategy or fully leverage alumni as ambassadors, mentors, or volunteer leaders within the broader APS community. As a result, a valuable network of young philatelic leaders remains underutilized.

Objective: By May 2027, implement a structured YPLF engagement strategy that (1) launches a content marketing initiative highlighting current fellows and alumni to increase awareness of philately among younger audiences, and (2) establishes an alumni engagement framework to activate YPLF graduates as ambassadors, mentors, and volunteer contributors within APS programs and events.

Responsibility: Director of Education (Lead), Marketing Manager

Success Metrics:

- Content marketing plan launched by target date
- Minimum of 2 YPLF feature stories published and promoted annually
- Alumni engagement strategy implemented
- At least 20% of alumni are engaged annually as mentors, ambassadors, speakers, or other volunteer roles
- 50% increase in average annual YPLF applications by December 2030.

Strategic Priority Alignment:

2, 3



Core Function: American Philatelic Research Library (APRL)

The APRL serves as APS's archival and research authority, preserving philatelic knowledge and providing specialized services that enhance member value and support the broader philatelic community.

I. Library Service Requests

Status: The APRL provides specialized research and reference services to members, including reference assistance, scans, book loans, photocopying, and bookshop support. While these services generate revenue, pricing criteria and fee assessments have not been consistently standardized. In addition, service response times and operational metrics have not been systematically tracked.

Objective: By December 2027, standardize pricing structures, implement performance tracking, and increase net revenue from APRL service requests by 15% while improving service efficiency and turnaround times.

Responsibility: Library Director (Lead)

Success Metrics:

- Standardized reference fee structure implemented by January 2026
- Pricing review for library services completed by September 2026
- Updated fee schedule implemented
- Service response and completion time tracking implemented by March 2026
- 80% of reference requests completed within one week by March 2027
- 80% of scan, book loan, photocopy, and bookshop requests completed within 1 working day by March 2027
- 15% increase in APRL service revenue by December 2027
- Maintain 80%+ member satisfaction rating for library services

Strategic Priority Alignment:

1, 5

II. Donations Backlog & Archival Processing

Status: The APRL maintains a substantial backlog of donated auction catalogs, journals, archival materials and other donated materials that remain unprocessed. This backlog occupies valuable space, limits accessibility for researchers, and limits the research value of the collection. Processing and cataloging these materials is labor-intensive but essential to preserving institutional value.

Objective: By December 2030, eliminate 100% of the current Auction Catalog backlog and process at least 60% of the current Journal backlog, while improving archival tracking and accessibility.

Responsibility: Library Director (Lead)

Success Metrics:

- Clear six rows in Closed Stacks by December 2026
- Process and shelve 24 boxes of Auction Catalogs and 35 boxes of Journals by December 2026
- All donated materials relocated to designated staging areas by August 2027
- 100% of unprocessed archival materials assigned accession record and location by December 2027
- Increase cataloged collection discoverability through updated digital records
- Reduction in average retrieval time for requested archival materials
- Researcher utilization of previously backlogged materials

Strategic Priority Alignment:

1, 2



Core Function: Robert A. Mason Digital Library (RAMDL)

The RAMDL is a flagship APS digital asset that expands access to philatelic knowledge, strengthens APS's authority as a trusted steward of the hobby, and supports the Society's growth model by increasing awareness, engagement, and member value through high-quality digital research resources.

I. RAMDL Search Functionality

Status: RAMDL currently relies on baseline, out-of-the-box search functionality that limits discovery, filtering, and overall researcher experience, reducing usability and satisfaction.

Objective: By May 2026, launch a customized front-end search experience for the Robert A. Mason Digital Library on stamps.org to improve discoverability, usability, and researcher satisfaction.

Responsibility: Digital Librarian (Lead), Library Director, Digital Library Specialist

Success Metrics:

- User testing completed by March 31, 2026
- Customized search launched by May 2026
- Launch event conducted at Boston 2026 with 50+ participants
- 15% increase in returning RAMDL users within 12 months
- 25% increase in RAMDL search queries within 12 months of launch

Strategic Priority Alignment:

2, 3



II. RAMDL Registration & Member Gated Features

Status: RAMDL is currently accessible without registration, limiting APS's ability to measure usage, build relationships with non-member researchers, and convert engagement into membership growth.

Objective: With the launch of the new website and single sign-on (SSO), require non-members to create a free account to access RAMDL and restrict download and print functionality to APS members.

Responsibility: Director of Technology & Innovation (Lead), Digital Librarian, Digital Library Specialist

Success Metrics:

- Registration requirement live at website launch
- Download/print functionality member-gated at launch

- 250+ non-member registrations within 12 months of SSO
- Target 5% lead-to-member conversion within 12 months

Strategic Priority Alignment:

4, 5

III. Integrated APRL Catalog & RAMDL Search

Status: Currently, users must search APRL catalog and RAMDL assets separately and independently. Providing an integrated APRL and RAMDL search would significantly improve the philatelic researcher's experience.

Objective: By December 2028, develop and begin usability for a front-end search feature on Stamps.org that enables an integrated simultaneous search of both the APRL catalog and RAMDL assets.

Responsibility: Library Director (Lead), Digital Librarian, Digital Library Specialist, Director of Technology & Innovation

Success Metrics:

- Integrated search launched on Stamps.org by August 2029.
- Single search interface supports filtering by source (APRL vs RAMDL)
- Researcher satisfaction rating of 80%+ for integrated search experience

Strategic Priority Alignment:

1, 3

IV. RAMDL Content Development

Status: RAMDL has largely exhausted readily available native digital assets. Future growth will require demand-driven digitization of physical materials, coordination with new philatelic partners, rights clearance, and metadata capture.

Objective: By December 2030, add 25 journal titles, 80 book titles and 400 exhibits to the RAMDL.

Responsibility: Digital Librarian (Lead), Library Director

Success Metrics:

- 2026–2027 digitization priorities defined by April 15, 2026
- Standardized donor copyright agreements updated by April 15, 2026

- Approved marketing and development plan to expand exhibit content launched by July 2026
- Total of 80 new titles added by December 2026
- 25 journal titles, 80 book titles, and 400 exhibits added by December 2030

Strategic Priority Alignment:
2, 3, 5



V. RAMDL Metadata

Status: Article indexing is currently available for a limited subset of RAMDL assets. High-quality article metadata is essential to discovery and usability, but creation requires detailed review by people knowledgeable about philately. While automation tools may assist over time, accuracy standards still require significant human quality control.

Objective: By December 2030, add article indexing for at least 65 journal titles to improve search relevance, discovery, and researcher experience.

Responsibility: Digital Librarian (Lead), Library Director

Success Metrics:

- Top 20 article indexing priority projects identified by April 15, 2026
- Outreach conducted to at least 20 partner organizations by October 2026 resulting in recruitment and onboarding of 10 volunteer contributors by October 2026
- Business case completed by August 2026 to evaluate potential for outsourcing/offshoring scanning and non-specialist metadata fields (author, title, date, page)

Strategic Priority Alignment:
1, 2



VI. Digital Preservation & Archiving of External Philatelic Assets

Status: A substantial amount of high-value philatelic research, data, and digital scholarship currently exists on independently owned websites, personal datasets, privately hosted digital platforms and in APS archives. Many of these assets lack a formal preservation plan and risk permanent loss as their creators retire, age out of the hobby, or the assets physically degrade. While these assets could be excellent additions to the RAMDL, APS lacks a well-defined framework to evaluate external digital assets for quality, determine archival suitability, secure intellectual property rights, and incorporate select materials into the RAMDL. Without a structured preservation strategy, the philatelic community risks the gradual erosion of valuable digital scholarship.

Objective: By April 2027, develop and present a comprehensive digital preservation plan, including a business case outlining a scalable framework for identifying, evaluating, acquiring rights to, and archiving high-value external digital philatelic assets within the RAMDL. The business case will define quality standards, legal considerations, technical requirements, resource implications, and governance processes necessary to responsibly steward external digital scholarship.

Responsibility: Library Director (Lead), Digital Librarian, Digital Library Specialist

Success Metrics:

- Environmental scan of at least 10 independently hosted philatelic digital assets completed by October 2026
- Create plan for internal asset digital preservation, completed by December 2026
- Proposed quality evaluation criteria and archival standards defined, copyright acquisition framework developed, and business case completed by February 28, 2027
- Create educational materials for philatelic community to encourage digital estate planning for digital assets by March 2027.
- Decision to proceed with 90 days of business case completion.

Strategic Priority Alignment:

2



Core Function: Circuit Sales



Circuit Sales remains one of APS's most valued member programs, playing a critical role in many collectors' ability to buy and sell lower-value philatelic material to build their collection and monetize duplicate materials. Although program participation and revenue have declined in recent years—and increasing frequency of insurance claims associated with lost circuit books have materially affected net income—the program continues to demonstrate strong member loyalty and demand.

The strategic focus for Circuit Sales is straightforward: restore disciplined growth, reduce preventable losses, and validate a sustainable operating model before making long-term technology investments.

I. Category Optimization

Status: Over time, Circuit Sales categories have accumulated without consistent or systematic performance review. Some categories generate minimal participation or revenue while requiring administrative oversight.

Objective: By June 2026, conduct a data-driven review of all Circuit Sales categories and eliminate or consolidate persistently low-performing categories to improve operational focus and inventory efficiency.

Responsibility: Director of Sales & Fulfillment (Lead), Circuit Manager, Deputy Sales Director

Success Metrics:

- Category review and optimization recommendations by June 2026
- Approve plan to consolidate or retire underperforming categories by August 2026
- Demonstrable improvement in average category participation and turnover by June 2027

Strategic Priority Alignment:

1, 3, 5

II. Program Promotion & Participation Growth

Status: APS has not actively promoted Circuit Sales in recent years despite continued member reliance on the program. Participation levels suggest meaningful opportunities for growth, particularly through better communication of high-demand categories and underutilized inventory.

Objective: By July 2026, reestablish recurring promotion of the Circuit Sales program across The American Philatelist, APS digital channels, and social media. Promotions will highlight high-performing categories in need of additional seller inventory, encourage buyer participation in common interest categories with strong available inventory, and reinforce the value and simplicity of the program.

Responsibility: Director of Sales & Fulfillment (Lead), Marketing Manager, Editor-in-Chief

Success Metrics:

- By July 2026, launch AP, social media and other APS digital channel promotions to run on a recurring cadence
- Quarterly reporting of buyer and seller registrations
- Monthly reporting of revenue
- Increase in inventory submissions within targeted high-demand categories
- 5% average annual increase in Circuit Sales revenue by 2030

Strategic Priority Alignment:

4, 5

III. Prepaid Shipping & Signature Confirmation Proof of Concept

Status: Insurance claims from lost circuit books are the primary financial risk to program sustainability. APS already has a contract with Grand Shipper to enable prepaid postage and signature confirmation; however, operational implementation within the current technical environment presents workflow challenges.

Before committing to a Circuit Sales systems modernization investment, APS must first obtain proof-of-concept that the new shipping methodology will meaningfully reduce insurance claims and solve the root problem.

Objective: As early as practicable in 2026, implement prepaid shipping labels with signature confirmation within the current operating environment in a cost-effective manner that avoids significant investment in legacy systems.

Responsibility: VP of Operations (Lead), Director of Technology & Innovation, Deputy Sales Director and Director of Sales and Fulfillment

Success Metrics:

- Operational workflow enabling prepaid labels + signature confirmation implemented in 2026
- Measurable reduction in lost circuit incidents and related insurance claims relative to prior baseline
- Participant acceptance maintained at levels consistent with 2026 Circuit Sales participant survey findings

Strategic Priority Alignment:
1, 4, 5



IV. Circuit Sales Systems Modernization

Status: Circuit Sales currently operates on aging systems that limit tracking visibility, workflow efficiency, and reporting capability.

Objective: Contingent upon successful proof of concept demonstrating material loss reduction, proceed with modernization of Circuit Sales systems as part of the Expertizing and Circuit Sales Solution Update initiative under the Technology & Innovation Core Function.

This modernization will integrate package tracking, reporting, workflow automation, and member visibility through the My APS portal.

Responsibility: Director of Technology & Innovation (Lead), Deputy Sales Director, VP of Operations

Success Metrics:

- Formal decision to proceed based on defined proof-of-concept criteria by December 2026
- System requirements defined and approved by January 2027
- Updated system developed and integrated August 2027, including tracking visibility on member’s My APS page
- 5% average annual increase in Circuit Sales revenue by 2030
- Sustained positive net income from Circuit Sales following system implementation

Strategic Priority Alignment:
1, 5



Core Function: Expertizing Services (APEX)



Expertizing Services (APEX) reinforces APS’s authority, protects collectors, and strengthens confidence in the philatelic marketplace. As the only U.S. authentication service that guarantees its opinions, APEX represents both a critical member service and a strategic revenue opportunity. Ensuring its financial sustainability and long-term expert pipeline is essential to APS’s institutional credibility and future growth.

I. APEX Promotion & Revenue Optimization

Status: APEX is the only U.S.-based authentication service that guarantees its opinions and is competitively priced within the market. While service quality and operational consistency have improved significantly in recent years, APEX has operated at a modest net loss for several consecutive years.

Promotion of APEX has been inconsistent. APS discontinued regular promotion within *The American Philatelist* and ceased production of the highly engaging “Forged or Genuine” educational content in 2024. Increased awareness of APEX’s value proposition will increase program participation and drive revenue.

Objective: By July 2026, reestablish sustained promotional visibility for APEX through a recurring feature in *The American Philatelist* and relaunch a redesigned, digitally optimized “Forged or Genuine” edutainment series across APS platforms.

By April 2027, integrate automated promotion of optional APEX services into the redeveloped Stamp Store for philatelic items exceeding defined value thresholds.

Increase APEX order volume sufficiently to achieve operational break-even and establish sustained annual growth.

Responsibility: Director of Expertizing (Lead), Marketing Manager, Director of Technology & Innovation

Success Metrics:

- Recurring AP promotional feature launched by July 2026
- Redesigned “Forged or Genuine” series launched with new website, generating a minimum 5,000 engagements across platforms within 12 months of relaunch
- 25% increase in traffic to APEX service pages within 12 months
- Automated APEX promotion live in Stamp Store by April 2027
- 2% increase in APEX orders by July 2027
- 5% average annual increase in APEX orders through 2030
- Achieve break-even APEX operations by December 2028

Strategic Priority Alignment:

1, 2, 4, 5



II. APEX Expert Pipeline & Accreditation

Status: The availability of qualified expertizers has declined in several critical categories over the past decade. Without a structured recruitment and accreditation framework, APEX risks reduced capacity, slower turnaround times, and long-term service instability. Stabilizing and expanding the expert pipeline is essential to maintaining service quality and institutional authority.

Objective: By January 2027, establish and promote a formal APEX accreditation framework modeled after APS judge accreditation standards. Develop and implement a targeted recruitment plan that leverages APS in-person education programming and other engagement channels to identify, mentor, and accredit new experts in the most vulnerable expertizing categories.

Responsibility: Director of Expertizing (Lead), Director of Education

Success Metrics:

- Accreditation standards and process approved by November 2026
- Accreditation guidelines published and promotion plan activated by January 2026
- APEX accreditation integrated into Summer Seminar and other in-person education programs
- Minimum of 5-10 new accredited experts by October 2027
- Maintain 80%+ member satisfaction rates

Strategic Priority Alignment:

1, 5



Core Function: Editorial

Editorial content is one of APS's most powerful engagement and authority-building tools. Through *The American Philatelist* (AP), *StampEd*, and *Philatelic Literature Review* (PLR), APS helps shape the intellectual discourse of organized philately and delivers one of its most valued member benefits.

To fully leverage this strength, editorial initiatives must balance tradition with modernization—improving accessibility, discoverability, and digital reach while preserving scholarly integrity and brand authority. The initiatives in this section focus on enhancing content presentation, expanding audience reach, improving monetization opportunities, and aligning editorial assets more directly with APS's broader growth and sustainability objectives.

By strengthening its editorial platforms, APS will deepen engagement with current members, attract new audiences, and reinforce its position as the trusted national authority in philatelic knowledge and integrity.



I. The American Philatelist (AP)

Status: Member feedback indicates that engagement with the AP is sometimes limited to issues featuring content of specific interest to the member's area of specialty. While most editions include general-interest content, this is not consistently positioned. Additionally, current cover design emphasizes the issue theme but does not effectively communicate the breadth of content within each edition.

Objective: By the May 2026 edition, launch a cover redesign incorporating strategic coverlines to improve read-through and content discoverability. By January 2027, introduce a recurring general-interest column designed to broaden issue-wide readership.

Responsibility: Editor-in-Chief (Lead)

Success Metrics:

- Cover redesign implemented by target date
- Recurring general-interest column launched by January 2027
- 10% increase in digital AP page views

Strategic Priority Alignment:

2, 4

II. AP Sidebar Pilot (Beginner Accessibility)

Status: Feedback suggests that some beginning collectors find certain AP articles technically challenging, potentially limiting accessibility and engagement for newer members.

Objective: By the October 2026 edition, pilot an editorial sidebar feature designed to clarify terminology, context, and key learning points to improve accessibility for beginner and intermediate readers.

Responsibility: Editor-in-Chief (Lead)

Success Metrics:

- Sidebar feature piloted by target date
- 10% increase in engagement from members with less than 3 years tenure
- Conduct evaluation of the pilot and render decision to permanently adopt sidebars by June 2027

Strategic Priority Alignment:

2, 4

III. Non-Member AP Distribution

Status: The AP is consistently rated as APS's highest-value member benefit. Currently, distribution is limited to members only, restricting its potential role as an awareness and recruitment tool.

Objective: By March 2027, complete a business case evaluating the financial viability, brand impact, and membership conversion potential of expanded AP distribution through third-party channels.

Responsibility: Editor-in-Chief (Lead)

Success Metrics:

- Business case completed by March 2027
- Decision to pilot non-member distribution strategy within 90 days of completion
- If approved, pilot distribution is executed within 12 months
- Target of 0.5% non-member distributed issues result in new member application within 1 year of launch

Strategic Priority Alignment:

2, 4, 5

IV. Philatelic Literature Review (PLR)

Status: PLR subscription growth is constrained by legacy positioning and a subscription process that is not integrated into APS's digital ecosystem.

Objective: With the December 15, 2026 Stamps.org relaunch, rebrand PLR as a standalone subscription offering and fully integrate subscription and renewal functionality within APS's broader digital platform.

Responsibility: Editor-in-Chief (Lead), Director of Technology & Innovation, Director of Library Services

Success Metrics:

- Rebrand and integration completed by December 15, 2026
- 25% increase in PLR subscriptions within 12 months of launch
- 75% increase in total subscriptions by December 2030
- 80% subscription renewal rate



Strategic Priority Alignment:

1, 2, 5

V. APS Book Publication Task Force

Status: APS book publishing activities currently require significant staff resources relative to revenue generated, warranting strategic evaluation.

Objective: By March 2027, establish a Book Publishing Task Force to evaluate APS's book publishing model, including cost structure, strategic relevance, and revenue potential.

Responsibility: Editor-in-Chief (Lead)

Success Metrics:

- Task Force established by March 2027
- Strategic recommendation and implementation plan delivered within 6 months
- Implementation plan approved within 90 days of recommendation

Strategic Priority Alignment:

5

VI. StampEd

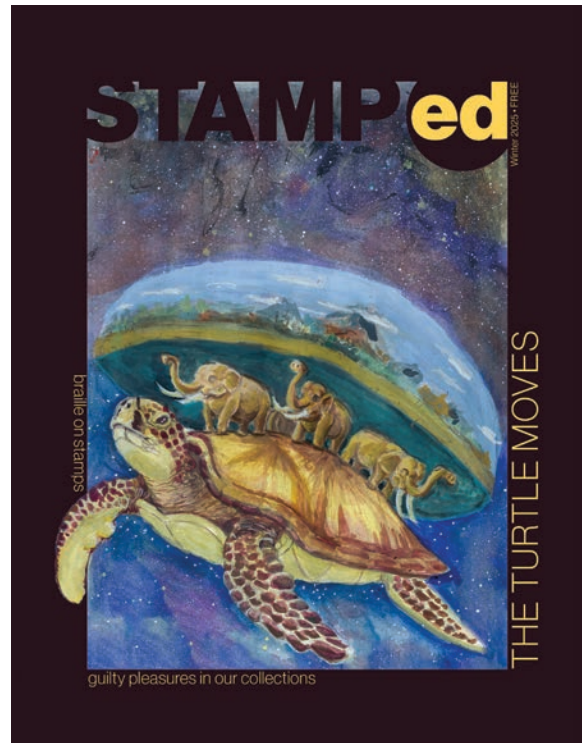
Status: The *StampEd* digital magazine project has been on hiatus since early 2025. In its first year, it reached an audience of ~10,000 readers, some within the APS member community and some outside of it. Member feedback acknowledges many positives – easy to understand, beginner-friendly, and interesting for new or beginning collectors. The primary limitations relate to the PDF format, which restricts mobile accessibility and article-level shareability.

Objective: By December 2026, develop a plan to relaunch the digital magazine with a blog-style layout, social media shareability, and more frequent content.

Responsibility: Editor-in-Chief (Lead), Education Director, Director of Technology & Innovation

Success Metrics:

- Plan produced by according to target date
- Decision to proceed by February 2027
- If the decision is to proceed then produce a content and marketing plan by May 2027 and launch the landing page and content management system by October 2027
- Target 15,000 monthly readers within 36 months of relaunch, with 20% of readers originating outside of APS membership



Strategic Priority Alignment:

2



Core Function: APS Chapter Clubs

APS's 360 chapter clubs across the United States represent the Society's grassroots network and one of its most powerful, yet underutilized, growth engines. These clubs provide local community, fellowship, and hands-on engagement opportunities that no national organization can replicate on its own.

While APS has historically supported chapter clubs, there is significant opportunity to strengthen alignment, communication, and shared activation strategies. With focused coordination and modest strategic investment, chapter clubs can play a more intentional role in welcoming new members, fostering social connection, and driving localized recruitment and retention efforts.

By deepening partnership with chapter leaders and equipping clubs with practical tools and resources, APS can amplify its national reach and ensure that new and existing members experience philately not only as a hobby, but as a shared and enduring fellowship with likeminded intellectually curious people. Chapter clubs represent APS's most scalable local activation platform, translating national strategy into in-person and experiential engagement opportunities.

I. Monthly Chapter Club Newsletter

Status: APS has difficulty maintaining an accurate and up-to-date list with contact information for APS Chapter Club leadership, and it no longer produces a recurring newsletter specific to the communication and engagement needs of this unique audience.

Objective: By September 2026, ensure accurate officer contact information for at least 80% of APS Chapter Clubs. By January 2027, relaunch a recurring monthly APS Chapter Club newsletter designed to strengthen alignment, share best practices, and promote growth initiatives.

Responsibility: VP of Operations (Lead), Marketing Manager, Director of Technology & Innovation

Success Metrics:

- ≥80% verified officer contact coverage by September 2026
- Newsletter launched by January 2027
- ≥50% open rate among chapter leaders within 12 months
- ≥10% of clubs engage (reply, submit content, or participate in featured initiatives) within 18 months

Strategic Priority Alignment:

1, 3, 4



II. Biannual Membership Drive

Status: APS has been inconsistent in its efforts to conduct membership drives among APS chapter clubs. Some clubs are willing to share their membership lists with emails and contact information, others are not. This greatly limits APS ability to recruit new members from local clubs.

Objective: By December 2026, launch a recurring biannual Chapter Club Membership Drive leveraging digital discount codes, turnkey communication templates, and inspirational messaging for club leaders to distribute locally. Recognize high-performing Chapter Clubs annually across APS communication channels.

Responsibility: VP of Operations (Lead), Marketing Manager

Success Metrics:

- Campaign toolkit delivered by December 2026
- Participation from ≥65% of APS Chapter Clubs in Year 1
- Trackable digital discount code utilization
- ≥150 new APS member applications in 2026 from Year 1 promotion
- ≥80 new APS member applications annually beginning in 2027
- Annual recognition of top performing clubs

Strategic Priority Alignment:

1, 5

III. APS Chapter Club Digital Resource Kit

Status: Some APS clubs are thriving, while others are slowly declining. All are led by selfless volunteers with different skill sets and leadership experiences. The clubs that are thriving have highly engaged leadership, dynamic and engaging meeting plans full of fun activities, and grow their club's membership by proudly promoting themselves in their local communities. There is much clubs can learn from one another.

Objective: By March 2027, launch a comprehensive APS Chapter Club Digital Resource Kit designed to strengthen leadership capacity, improve meeting quality, support local marketing, and facilitate new club formation.

Responsibility: VP of Operations (Lead), Membership Manager, Marketing Manager

Success Metrics:

- Resource kit published by March 2027
- ≥100 unique club leader engagements and downloads within 12 months
- ≥25% of clubs report using at least one toolkit resource annually

Strategic Priority Alignment:

1, 2, 3, 5

IV. Technical Infrastructure Business Case

Status: Many Chapter Clubs struggle to maintain websites, manage membership data, and communicate effectively with members. This administrative burden consumes volunteer time and financial resources that could otherwise be directed toward member engagement and recruitment.

Objective: By December 2028, complete a formal business case evaluating the feasibility, cost structure, governance requirements, and growth impact of APS providing standardized website and communication infrastructure to Chapter Clubs.

Responsibility: Director of Technology & Innovation (Lead), VP of Operations, Stamp Shows Director

Success Metrics:

- Business case completed by December 2028
- Financial modeling completed with per-club cost analysis
- Member sentiment survey conducted among ≥ 50 club leaders
- Decision to whether or not to proceed by March 2029
- If approved, pilot program launched with 5–10 shows by December 2029

Strategic Priority Alignment:

1, 3, 4, 5



Core Function: Stamp Shows



The American Philatelic Society plays a central leadership role in the U.S. stamp show ecosystem. Each summer, APS coordinates the Great American Stamp Show (GASS), the largest annual stamp show in the United States. In addition, APS accredits, promotes, and provides exhibiting and judging infrastructure for 24 World Series of Philately (WSP) shows held in cities across the country. Under the auspices of APS and the International Federation of Philately (FIP), the Society also supports and engages in a decennial international exhibition hosted in a major U.S. city. Beyond these formally affiliated events, APS maintains informal relationships with numerous additional domestic stamp shows.

Due to rising travel and lodging costs, APS's in-person marketing presence is largely concentrated at GASS and decennial international exhibitions. However, stamp shows collectively remain one of organized philately's most visible and experiential platforms—bringing together collectors, dealers, exhibitors, and volunteers in a shared environment of fellowship, learning, and marketplace activity.

Like many volunteer-driven events across the nonprofit landscape, stamp shows face structural challenges. Show administrators consistently identify four interrelated pressures: a declining pool of volunteers for show leadership roles, increasing venue and operational costs, attrition within the dealer pipeline, and softening attendance levels in several markets.

Despite these challenges, stamp shows remain an essential ingredient in organized philately. They provide irreplaceable opportunities for community connection, hands-on discovery, collection building, and new recruitment. As APS looks to the future, the strategic focus will be to modernize the stamp show model by enhancing the experiential elements that make shows compelling for both longtime collectors and new audiences.

I. Stamp Show Membership Promotions

Status: APS has not consistently designed, executed, or measured structured lead-generation and membership conversion promotions at GASS and other major stamp shows.

Objective: By May 2026, design and pilot integrated lead-capture and on-site membership conversion promotion at the Boston 2026 International Stamp Show, incorporating digital lead capture, limited-time membership incentives, and experiential engagement elements designed to attract both active collectors and the philatelic-adjacent audience that are likely to be in attendance.

Responsibility: VP of Operations (Lead), Stamp Show Director, Marketing Manager

Success Metrics:

- Activation plan finalized by 15 April 2026 and executed in May 2026
- Digital lead capture operational
- ≥1,000 leads captured at Boston 2026
- ≥250 new memberships attributable to show activations
- Post-show ROI analysis completed within 60 days

Strategic Priority Alignment:

1, 3, 4, 5



II. APS Promotion Kit for Show Volunteers

Status: Due to travel cost constraints, APS's ability to maintain staff presence at all WSP and smaller shows is limited. However, APS has a large potential pool of members, local Chapter Club volunteers, and directors-at-large who could serve as volunteer ambassadors if provided with clear messaging, tools, and lead capture systems.

Objective: By October 2026, develop a turnkey APS promotion and recruitment toolkit to equip trained volunteers to represent APS consistently at WSP and other shows. By January 2027, launch a volunteer ambassador registration, training, and coordination system.

Responsibility: Stamp Show Director (Lead), VP of Operations, Marketing Manager

Success Metrics:

- Toolkit developed and ready for distribution by October 2026
- Volunteer ambassador registration system live by January 2027
- ≥20 trained volunteer ambassadors active in 2027
- ≥150 new memberships annually attributable to volunteer show presence by 2028

- ≥500 qualified leads generated annually via volunteer activation by 2028
- APS represented at ≥80% of WSP shows by 2030

Strategic Priority Alignment:

1, 2, 3, 5

III. Standardized Event Experiences to Attract Prospects

Status: Several high-engagement programming elements have proven effective in attracting prospects and deepening engagement at stamp shows, including on-the-road APS education programming, Scout merit badge workshops, “Stamps in Your Attic” evaluations, and Postcrossing events. However, these experiences are not consistently available across WSP shows, largely due to coordination burden and limited volunteer capacity at the local level.

Objective: By December 2027, develop and deploy standardized toolkits and implementation resources that enable any WSP stamp show to confidently offer one or more of these experiential components with minimal additional administrative burden.

Responsibility: Stamp Show Director (Lead), Education Director

Success Metrics:

- Standardized toolkits completed by December 2027, including an implementation checklist, marketing templates, volunteer/staffing guidance, and a post-event evaluation template
- At least 8 WSP shows implement at least one standardized experiential component in 2028 using the toolkit
- 80%+ satisfaction rating from participating show coordinators regarding ease of implementation and perceived attendee value.

Note: Program-specific participation targets for Scout Merit Badge workshops and on-the-road education are defined in the Education Core Function and will be tracked in coordination with this initiative.

Strategic Priority Alignment:

2, 3

IV. Stamp Fair Pilot

Status: Large-footprint WSP shows face economic constraints in high-cost metropolitan markets, limiting APS’s presence in major population centers such as New York City and Los Angeles. Due to the very large population of these cities, there may be opportunity to test alternative, consumer-oriented event formats designed specifically to engage new, lapsed, and emerging collectors.

Objective: By April 2028, complete a formal business case / opportunity assessment to evaluate the feasibility, cost structure, sponsorship potential, and growth impact of piloting a family-friendly “Stamp Fair” designed to attract local audiences in a major U.S. city.

Responsibility: Stamp Show Director (Lead), Marketing Manager

Success Metrics:

- Business case completed by April 2028, including venue cost modeling and sponsorship feasibility analysis included
- Defined attendance, lead, and revenue thresholds required to proceed
- Business case review and decision to proceed within 90 of completions

Strategic Priority Alignment:

3, 5



V. Stamp Show Infrastructure Support

Status: Volunteer stamp show leadership faces similar technical infrastructure challenges as do APS Chapter Clubs. Many volunteer stamp show committees face challenges maintaining websites, managing exhibitor and dealer data, obtaining sponsorships, coordinating volunteer communications, executing digital marketing and securing adequate dealer participation. These administrative burdens consume an inordinate amount of volunteer time.

Objective: By December 2028, complete a formal business case / opportunity assessment evaluating the feasibility, cost structure, governance model, and operational impact of APS providing the technical infrastructure or other support to enable stamp show coordinators to more effectively coordinate, promote and execute their shows. This initiative will be evaluated in tandem with the APS Chapter Club Digital Infrastructure initiative.

Responsibility: Director of Technology & Innovation (Lead), Stamp Show Director

Success Metrics:

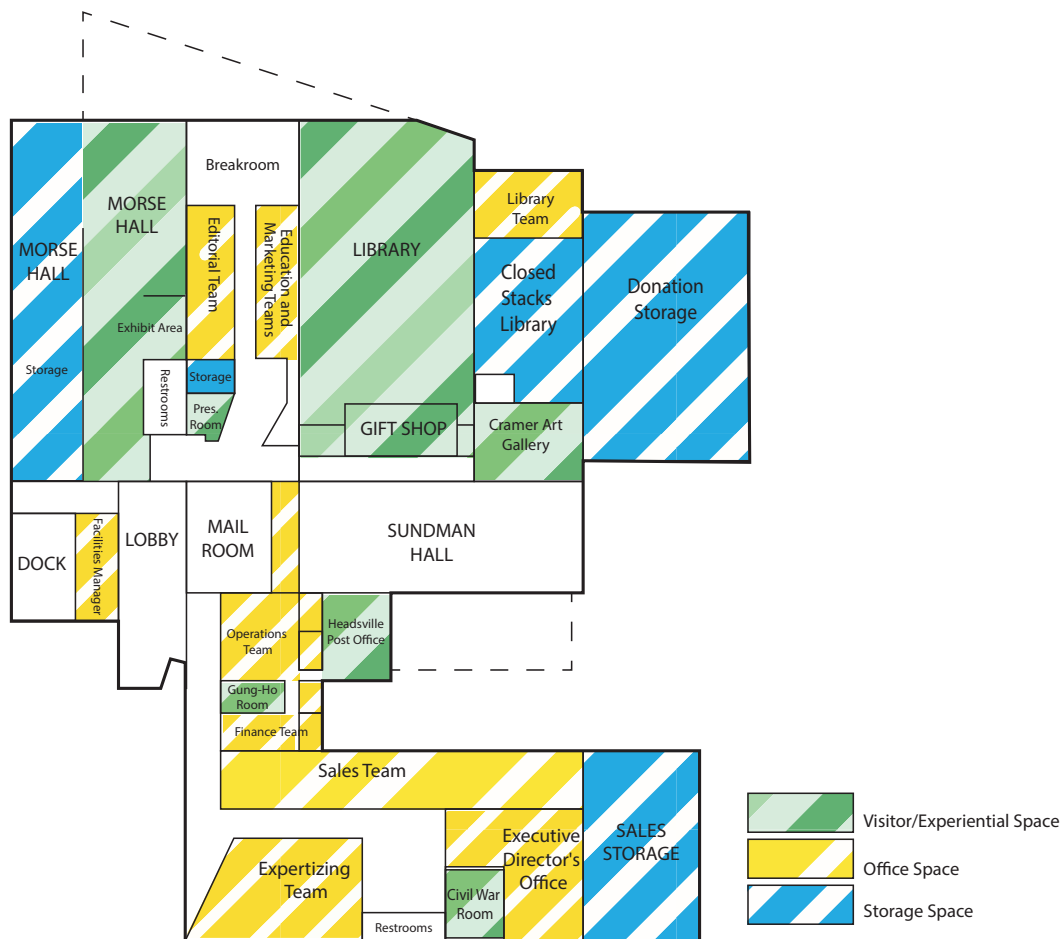
- Business case assessment completed by December 2028 with deep participation from multiple show coordinators, followed by a survey of at least 75% of WSP show coordinators to validate demand
- Cost-per-show modeling completed
- Defined participation threshold for pilot viability
- If approved, pilot program launched with 5–10 shows by December 2029

Strategic Priority Alignment:

1, 4



Core Function: Real Estate & APC Facility



The Match Factory complex in Bellefonte, Pennsylvania serves as the operational headquarters of the American Philatelic Society (APS) and the American Philatelic Research Library (APRL). Within the complex, the American Philatelic Center (APC) houses APS staff offices, the APRL library and archival collections, museum-style exhibits, affiliate-sponsored specialty rooms, and spaces used for educational programming and member engagement. The broader Match Factory complex also includes commercial tenant spaces that generate rental income to support the Society's financial sustainability.

As stewards of a large and historically significant property, APS must ensure that the facility is responsibly maintained as both a mission-critical operational headquarters and a revenue-generating real estate asset. Routine maintenance is currently performed as needed; however, APS does not operate under a structured long-term maintenance and capital improvement plan for the complex.

In addition to building maintenance considerations, the current layout of the American Philatelic Center presents opportunities for improvement. Some prime APC areas with scenic river views are currently used for storage rather than member, visitor, or programmatic purposes. Museum-style displays, visitor spaces, and educational assets are dispersed throughout the facility rather than concentrated in a cohesive visitor experience area. APS staff offices are also distributed across multiple areas of the APC, which can hinder collaboration, workflow efficiency, and team cohesion.

The initiative below is designed to ensure disciplined stewardship of the Match Factory property while also developing a long-term plan to optimize the APC's visitor experience, staff workspace, and facility maintenance planning.



The Morse building is split into useable exhibit space and storage space. The storage side has a row of windows looking out towards Spring Creek, just a few yards away.



I. Tenant Occupancy & Leasing Strategy

Status: In 2025, rental income represented approximately 10% of APS operating revenue, making tenant occupancy an important contributor to the Society’s financial sustainability. Some commercial tenant spaces have remained unoccupied since tenant departures during COVID.

Available space is currently marketed through a commercial real estate agent; however, APS has not recently conducted a structured review of leasing representation, market pricing competitiveness, or broader promotional strategies.

Objective: By June 2026, complete a review of APS’s commercial leasing strategy for the Match Factory complex, including evaluation of leasing representation, pricing competitiveness, and marketing approach.

Based on this review, APS will establish updated leasing representation, confirm market-competitive pricing, and implement additional promotional efforts designed to increase visibility of available spaces and improve tenant occupancy levels.

Responsibility: Director of Expertizing (Lead), Facilities Manager, CFO

Success Metrics:

- Assessment of local commercial real estate market conditions and pricing competitiveness completed by June 2026
- Evaluation of current leasing representation completed and new commercial real estate representation secured, if appropriate, by July 2026
- Updated leasing and marketing strategy implemented by August 2026
- Measurable increase in tenant inquiries within 90 days of implementing the revised strategy

Strategic Priority Alignment:

1, 5

II. Match Factory Maintenance & Capital Planning

Status: The Match Factory complex currently operates without a formal long-term maintenance and capital improvement plan. Without a structured planning framework, it is difficult to systematically identify facility maintenance needs, prioritize capital improvements, estimate long-term costs, or integrate facility investments into the Society’s financial planning processes.

Given the scale and historical significance of the property, as well as its importance to APS operations and tenant revenue generation, a comprehensive assessment and planning process is necessary to guide responsible stewardship of the facility.

Objective: By October 2026, establish a Match Factory Facility Planning Task Force to conduct a comprehensive assessment of building maintenance and capital improvement needs across the entire complex.

The Task Force will perform facility walk-throughs and consult with APS/APRL staff, commercial tenants, and current service providers to identify maintenance needs and capital improvement opportunities. By June 2027, the Task Force will deliver:

- A prioritized inventory of facility maintenance and capital improvement needs across the Match Factory complex, including estimated costs and recommended sequencing.
- A multi-year facility maintenance and capital improvement planning framework integrated with APS financial planning processes.
- A spatial optimization plan for the American Philatelic Center (APC) designed to improve the visitor experience by consolidating museum and exhibit spaces while creating a more cohesive and collaborative workspace for APS staff.

Responsibility: Executive Director (Lead), CFO, Library Director, Facilities Manager, Director of Expertizing

Success Metrics:

- Match Factory Facility Planning Task Force established by October 2026
- Comprehensive facility walk-throughs and staff, tenant, contractor consultations completed by March 2027
- Prioritized inventory of maintenance and capital improvement needs developed by April 2027, and preliminary cost estimates prepared for identified projects by May 2027
- Conceptual APC spatial optimization plan completed by May 2027, including recommended consolidation of museum/display areas and improved staff workspace layout, and estimated investment required
- Integrated multi-year Match Factory maintenance and capital improvement plan presented to APS/APRL leadership and the Joint Finance & Audit Committee by August 2027
- Approved projects incorporated into long-term financial planning and facility management tracking processes

Strategic Priority Alignment:

1, 5



Core Function: Marketing



Marketing is the connective force that translates APS's mission and programs into awareness, engagement, and growth. Historically, APS operated with limited dedicated marketing infrastructure, modest digital engagement planning, and minimal investment in marketing technology. Achieving the goals of this strategic plan requires a more intentional, integrated, and data-informed marketing capability.

APS marketing must function as an integrated service platform that supports the initiatives of every Core Function in this plan. As APS delivers greater value, marketing must ensure that value is visible, accessible, and compelling to both current and prospective members.

Stamps and postal history represent an effectively limitless reservoir of content and discovery. When communicated effectively through coordinated digital, print, experiential, and multimedia channels, that content can attract new audiences, re-engage lapsed collectors, and deepen member loyalty.

The initiatives in this section are designed to build a vibrant, modern, and highly integrated marketing engine that reflects the mission, energy, and forward momentum of the APS.

I. Web Content Update

Status: The APS website serves as a primary digital touchpoint for members, prospects, and the broader philatelic community. Much of the current web copy is outdated, inconsistent in tone, overly detailed, and not optimized for modern digital consumption. Many pages are written in long-form prose with limited scannability, buried key messages, and inconsistent clarity in calls to action.



As APS prepares for the relaunch of its redesigned website, it is essential that site content reflect a revitalized and consistent brand voice. Web copy must clearly communicate APS’s value proposition, encourage deeper engagement, serve both members and prospective members effectively, and be structured to support search engine optimization (SEO) and measurable conversion goals.

Objective: By May 2026, complete a comprehensive content audit of the current website. By October 2026, update and modernize at least 80% of priority web page copy to ensure consistency in messaging, tone, SEO structure, and conversion clarity in advance of the website relaunch.

Responsibility: Marketing Manager (Lead), Director of Technology & Innovation

Success Metrics:

- Content audit completed and approved by May 2026
- Updated copy published for at least 80% of priority web pages by October 2026
- 25–50% increase in organic search traffic within 6–12 months of website launch
- Measurable improvement in engagement metrics (time on page, bounce rate, and conversion actions) on updated pages within 6 months of launch

Strategic Priority Alignment:
2, 3, 5

II. Integrated Marketing & Communications Plan

Status: APS does not currently operate under an Integrated Marketing & Communications Plan. Marketing activities occur across multiple channels—including print, email, website, social media, and partner communications—but are often ad hoc and reactive rather than strategically sequenced, audience-segmented, and performance-measured.

As APS modernizes its systems, expands programming, and activates new initiatives, the absence of a coordinated communications framework limits awareness, reduces impact, and constrains the organization’s ability to effectively support and drive engagement across all Core Functions.

Objective: By November 2026, develop and begin implementation of an Integrated Marketing & Communications Plan. The plan will focus on clearly defined audience segment priorities, unified messaging, and coordinated engagement and conversion strategies across all Core Functions.

Responsibility: Marketing Manager (Lead)

Success Metrics:

- Integrated Marketing & Communications Plan approved by November 2026
- Cross functional communications calendar operational for 2027, with documented campaign alignment for all major Core Function initiatives
- 100% of new major initiatives launched after January 2027 include a documented marketing activation plan
- Marketing automation platform actively supporting lead capture and segmented communication journeys by December 2027
- Year-over-year improvement in measurable engagement indicators (email engagement, website engagement, and social interaction), with baseline established within 60 days of the website launch

Strategic Priority Alignment:

3, 4, 5



III. Social Media

Status: APS maintains an active presence on Facebook, Instagram, YouTube, LinkedIn, and Tumblr, with established but modest followings on each platform. However, a growing number of independent philatelic content creators have demonstrated that consistent, well-positioned, visually engaging content can generate significantly larger digital audiences.

APS has not historically operated with a coordinated content strategy designed to maximize reach, engagement, and conversion. As APS modernizes its marketing infrastructure and expands programming, social media represents a high-opportunity channel to increase awareness, deepen engagement, and drive membership growth.

Objective: By October 2026, develop and implement a social media content calendar and increase average engagement rates across all social media channels by 15%, and double the total follower counts across all APS social media platforms by December 2030.

By October 2026, launch an APS TikTok presence and achieve 5,000 followers within 24 months. Establish baseline engagement and conversion data by March 2027 and increase engagement and conversion rates by 2%-3% annually through 2030.

Responsibility: Marketing Manager (Lead), Digital Content Specialist

Success Metrics:

- Develop and launch an APS TikTok presence by October 2026, and achieve 5,000 followers within 24 months
- Double the total follower count across existing APS social media platforms by 2030
- By October 2026, develop and implement a social media content calendar and increase average engagement rate (likes, comments, shares, saves) by 20% across all social media channels by January 2027

Strategic Priority Alignment:

3, 5



IV. Content Strategy & Editorial Calendar

Status: As outlined in the Education Core Function and throughout this Operations Plan, APS is poised to significantly expand its educational programming, digital assets, and member-facing content initiatives. At the same time, global stamps and postal history represent an effectively limitless reservoir of storytelling potential—spanning history, culture, art, science, geography, and global events, to engage new member prospects.

However, APS does not currently operate under a coordinated organization-wide content strategy. Educational materials, stamp stories, edutainment videos, program achievements, volunteer opportunities, and organizational milestones are not consistently translated into structured, audience-specific content designed to drive awareness, engagement and membership.

A deliberate content marketing framework will ensure APS fully leverages its most scalable and cost-effective growth assets: its intellectual capital and the inherent storytelling power of philately.

Objective: By March 2027, develop and begin implementation of a coordinated organization-wide Content Strategy that aligns content creation with defined target audiences and communication channels, integrates cross-functional content into a structured editorial calendar, and drives awareness, engagement and membership conversion objectives.

Responsibility: Marketing Manager (Lead), Director of Education, Editor-in-Chief, Digital Content Specialist

Success Metrics:

- Content Strategy and production calendar approved and operational by March 2027
- Minimum of 2–3 coordinated, cross-platform, multi-media content campaigns executed per quarter beginning in 2027
- Year-over-year increase in social media followers, content-driven website traffic and measurable year-on-year growth in content-attributed lead capture beginning in 2027

Strategic Priority Alignment:

2, 3, 5



V. Earned Media

Status: APS does not currently have the capability to execute an earned media strategy. With only a few exceptions, media visibility has been limited to philatelic media outlets. Given the clearly defined growth audiences in this Strategic Plan—active non-member collectors, retirees and near-retirees, and philatelic-adjacent knowledge communities—APS has a significant opportunity to reposition philately in targeted niche media environments where curiosity-driven audiences already gather.

APS's earned media strategy should focus on sustained placement within retirement and lifestyle publications; healthy aging and cognitive wellness outlets; history, genealogy, geography, art, military history, science, and other highly relevant niche knowledge communities. There is also opportunity to effectively engage new prospects through hobby, lifelong learning, and collector community media outlets.

A disciplined, audience-specific PR approach can significantly amplify awareness and engagement of APS content and programs and drive engagement among targeted audience segments.

Objective: By March 2027, engage a public relations agency with demonstrated expertise in retirement, lifelong learning, hobbyist, and niche knowledge audiences to design and implement a targeted earned media strategy aligned with APS's defined growth audiences.

Responsibility: Marketing Manager (Lead)

Success Metrics:

- PR agency selected and retained by March 2027
- 6-month earned media strategy and calendar within 30 days of engagement
- Average 2.5 targeted earned media placements per month by January 2028
- Minimum of 5 feature-length placements annually
- Minimum of 1,500 leads generated annually attributable to earned media
- 5% lead-to-member conversion rate from earned media-generated prospects within 24 months

Strategic Priority Alignment:
2, 3, 5

VI. APS Advertising Revenue

Status: Currently, the majority of APS advertising revenue is generated through the AP magazine. The upcoming Stamps.org relaunch and marketing automation platform create opportunities to expand advertising through bundled, multi-channel offerings. As APS increases digital traffic, engagement, and audience segmentation, it will also strengthen its value proposition to advertisers through bundled, multi-channel advertising opportunities.

Objective: By June 2027, develop and begin marketing multi-channel advertising bundles across print and digital platforms. Achieve a 20% increase in annual advertising revenue by December 2030.

Responsibility: Marketing Manager (Lead), Director of Technology & Innovation, Editor-in-Chief

Success Metrics:

- Multi-channel advertising bundles developed and marketed by June 2027
- 10% increase in average monthly advertising revenue within 12 months of launch
- 20% increase in annual advertising revenue by December 2030

Strategic Priority Alignment:
5

Core Function: HR

APS's staff and leadership team are the organization's most important operational asset. Successful execution of this Strategic Plan will require strong alignment between organizational priorities, individual responsibilities, and leadership capability across the Society.

As APS transitions from a period of operational stabilization to one of modernization and strategic investment, the organization must ensure that its people systems support clarity, accountability, collaboration, and professional growth. This includes clearly defined roles, structured performance management practices, and continued development of leadership skills among managers and supervisors.

By strengthening human resource practices and investing in leadership development, APS will create a work environment that supports staff engagement, effective collaboration, and the organizational resilience necessary to implement this Strategic Plan successfully.



I. Position Descriptions & Performance Management Framework

Status: APS currently operates with limited formalized position descriptions, performance planning processes, and structured annual performance review practices. As the organization undertakes significant strategic initiatives and operational modernization, greater clarity in roles, responsibilities, and performance expectations will help ensure alignment across the organization and support effective execution of the Strategic Plan.

Objective: Within 90 days of Strategic Plan approval, develop and implement formal position descriptions and 2026 performance plans for all APS staff that clearly align responsibilities with the priorities and initiatives outlined in this Strategic Plan.

By October 2026, implement a structured annual performance review process incorporating 360-degree feedback and performance evaluation against each employee's established performance plan.

To recognize and reward organizational contributions, APS will also reintroduce merit-based bonus opportunities tied to documented performance outcomes.

Responsibility: Executive Director (Lead), CFO, Senior Leadership Team

Success Metrics:

- Formal position descriptions completed and approved for staff within 90 days of Strategic Plan approval
- 2026 employee performance plans completed and acknowledged by all staff within 90 days of Strategic Plan approval
- 360-degree performance review framework developed and approved by September 2026, first 360-degree performance review cycle completed by December 2026
- Merit-based performance bonus framework reintroduced beginning with the 2026 performance cycle

Strategic Priority Alignment:

1

II. Management & Leadership Development

Status: Many APS managers and supervisors have grown into leadership roles through their subject-matter expertise and long-term commitment to the organization. However, the organization has not historically provided structured leadership training or management development support.

As APS undertakes the initiatives outlined in this Strategic Plan, strengthening leadership capability across the organization will be essential to maintaining alignment, managing organizational change, and supporting staff collaboration and engagement.

Objective: By September 2026, provide professional development training for all APS supervisory and management staff focused on core leadership competencies including executive communication, delegation, collaborative leadership, effective feedback, and performance management.

Beginning in October 2026, provide ongoing management coaching support to APS managers and supervisors to reinforce leadership development and support successful execution of strategic initiatives.

Responsibility: Executive Director (Lead), CFO

Success Metrics:

- APS managers and supervisors complete leadership training by September 2026
- Management coaching support program established by October 2026
- Demonstrated improvement in internal staff alignment and performance management practices beginning with the 2026 review cycle
- Merit-based performance bonus framework reintroduced beginning with the 2026 performance review cycle

Strategic Priority Alignment:

1

Core Function: Business Development

Philanthropy plays a vital role in sustaining the American Philatelic Society and the American Philatelic Research Library. Generous contributions from members and supporters help fund programs, education, research, and infrastructure that support the broader ecosystem of organized philately.

APS and APRL benefit from well-managed endowment funds that provide long-term financial stability. However, successful execution of this Strategic Plan also requires a consistent pipeline of unrestricted cash donations that can support operational priorities while preserving the Society's established reserve thresholds.



In recent years, APS has received strong philanthropic support from membership. Maintaining that momentum—and ensuring that fundraising communications are clear, compelling, and easy for members to engage with—will be essential to sustaining the Society's financial flexibility and supporting the initiatives outlined in this Strategic Plan.

The initiatives below focus on sustaining a reliable pipeline of unrestricted giving while simplifying and strengthening the Society's fundraising communication and donor engagement strategy.

I. Campaign for Philately

Status: APS has benefited from strong philanthropic support from its membership community in recent years. During 2024–2025, unrestricted cash donations within the Campaign for Philately fund averaged approximately \$450,000 annually. These unrestricted contributions provide critical flexibility to support operational priorities, strategic initiatives, and organizational stability.

Maintaining this level of unrestricted philanthropic support will be important to ensure that new initiatives can be pursued while preserving the Society's financial reserves.

Objective: Beginning in 2026 and continuing through the Strategic Plan period, maintain an average of approximately \$450,000 annually in unrestricted cash donations by leveraging member engagement, transparent communication about strategic initiatives, and clear messaging regarding the impact of philanthropic support.

Responsibility: Executive Director (Lead), CFO, Marketing Manager, VP of Operations

Success Metrics:

- Establish a Fundraising Task Force within 60 days of approval of this plan

- Maintain an annual average of approximately \$450,000 in unrestricted cash donations to the Campaign for Philately fund through the Strategic Plan period
- Develop annual reporting to membership that correlates unrestricted donations to the successful execution of the Strategic Plan

Strategic Priority Alignment:

5

II. Fundraising Simplification

Status: APS and APRL currently maintain numerous designated funds and donation opportunities supporting specific programs, initiatives, and legacy giving preferences. While these options provide flexibility for donors, the large number of giving options can create complexity when communicating fundraising priorities and may dilute the clarity and impact of fundraising messaging.

A simplified and more strategically structured fundraising framework would allow APS to communicate philanthropic opportunities more clearly while still preserving donor choice and honoring existing designated funds.

Objective: By December 2026, review fundraising program and designated funds and develop a simplified fundraising framework that consolidates giving categories into a smaller number of clearly defined philanthropic priorities aligned with the Strategic Plan.

The revised framework will support clearer donor communications, more compelling fundraising messaging, and improved alignment between philanthropic support and strategic priorities.

Responsibility: Executive Director (Lead), CFO, Marketing Manager, VP of Operations

Success Metrics:

- Comprehensive review of current fundraising funds and donation options completed by September 2026
- Simplified fundraising structure developed and approved by December 2026
- Revised fundraising messaging and donation pathways implemented across website and communications channels by early 2027
- Measurable improvement in donor engagement metrics (donor participation, repeat donations, average gift size) following implementation

Strategic Priority Alignment:

5

Core Function: Finance

Financial stewardship ensures that strategic ambition is supported by disciplined execution, timely insight, and sustainable resource allocation. As APS modernizes its technology stack and scales programmatic initiatives, Finance must operate on modern infrastructure that delivers real-time visibility, streamlined workflows, and management-focused reporting.

Our financial systems and their process design have led to excessive manual workflows, longer close cycles, limited integration across platforms, and reporting formats focused mainly on compliance rather than decision-making support. Tackling this technical and procedural debt is a strategic priority that supports enterprise-wide execution.

The initiatives in this section aim to establish a strategy-aligned budgeting and reporting framework, modernize the accounting platform, speed up the monthly close process, and redesign management reporting to directly support the Strategic & Operational Plan.

I. Strategic Budget & Financial Reporting Alignment

Status: APS's current budget and financial statement format is adequate but primarily structured around general ledger conventions rather than the Strategic & Operational Plan, limiting performance insight. Financial reporting does not consistently reflect strategic priorities, programmatic investment, long-term capital needs, or reserve strategy.

Objective: Beginning with FY2027, align APS's budgeting framework, capital planning, and financial reporting directly with the Strategic & Operational Plan to strengthen strategic oversight, resource allocation, and long-term financial sustainability.

Key Actions:

- Structure the annual budget around strategic priorities and major business lines.
- Establish a formal multi-year capital investment plan addressing technology modernization, infrastructure, and major enterprise initiatives.
- Redesign financial statements to clearly distinguish operating performance, strategic initiatives, capital expenditures, and reserve activity.
- Align Board reporting with strategic objectives, capital commitments, and key performance indicators.

Responsibility: CFO (Lead), Executive Director

Success Metrics:

- The FY2027 budget will be in a strategic format for the October 2027 board meeting
- Capital investment plan formally approved and incorporated into financial reporting
- Board reporting framework revised to reflect the Strategic Plan structure

Strategic Priority Alignment:

1, 4, 5

II. Accounting Software Upgrade

Status: APS's current accounting software operates on an on-site server, is several versions behind, and lacks integration with membership CRM, e-commerce, and other core operational systems. Manual reconciliations and journal entries consume staff capacity and delay reporting.

Objective: By March 2027, implement a modern, cloud-based, fully integrated accounting and financial management system that supports automated workflows, real-time reporting, enhanced internal controls, and scalable growth.

Responsibility: CFO (Lead), Director of Technology & Innovation

Success Metrics:

- New accounting platform implemented and fully operational by March 2027
- Integration with core operational systems to minimize manual data entry
- 50% reduction in manual journal entries and reconciliation processes
- Real-time financial dashboards are available to executive leadership
- Monthly financial close is consistently completed within 15–20 days
- Improved audit efficiency and documented internal controls

Strategic Priority Alignment:

1, 4, 5



III. Monthly Close Process Modernization

Status: The current monthly close process is complex and highly manual, with transaction-level allocations and reconciliation workflows that extend close timelines and limit forward-looking analysis.

Objective: By June 2027, streamline and modernize the monthly close process, reducing close time by at least 50% and enabling earlier delivery of actionable financial insight.

Responsibility: CFO (Lead)

Success Metrics:

- Standardized and documented close calendar implemented
- 50% reduction in close cycle time from baseline
- Transition from transaction-level allocations to structured month-end allocation methodology
- Reduction in reconciliation backlog and elimination of redundant processes

Strategic Priority Alignment:

1, 4, 5



IV. Management Reporting & Financial Decision Support

Status: Financial reporting is currently structured around general ledger and statutory requirements rather than management decision-making. Consolidated visibility across legal entities and business units is limited, and financial data is not consistently aligned with operational KPIs.

Objective: By December 2027, redesign APS's management reporting framework to deliver consolidated, decision-focused financial reporting aligned with enterprise strategic priorities and operational performance metrics.

Responsibility: Executive Director (Lead), CFO, Director of Technology & Innovation

Success Metrics:

- Consolidated financial reporting across both legal entities
- Standardized monthly management reporting package aligned with strategic priorities
- Financial dashboard integrating budget vs. actual, forecast, and key operational KPIs in line with the Strategic Plan initiatives
- Business unit visibility across major programs and revenue streams
- Board reporting format standardized and adopted

Strategic Priority Alignment:

1, 4, 5



