



## 5/5/5 Unit Retention and Recruitment Plan – FAQ

### Why does the ACBL give a portion of a member fees back to a unit?

Local, grassroots efforts by units go a long way toward increasing membership retention and recruitment. The ACBL supports each unit's programs to increase these numbers by sharing a percentage of membership fees acquired in the unit. This money should be used for retention and recruitment programs.

### What is the 5/5/5 plan?

The 5/5/5 plan involves three potential 5% increments to the unit's share of membership fees based on specific retention and recruitment activities and replaces the previous 11% program.

### How much is the percentage units receive?

Under the new 5/5/5 plan, each unit may receive up to 15% of the membership fees collected in their unit.

### What are the benefits of the 5/5/5 plan?

Units will have access to a greater amount of funds and also have a more robust unit. The ACBL will have a more up-to-date member database.

### How does the 5/5/5 plan work? How does a unit receive a full 15%?

- **Automatic Base Percentage:** Units automatically receive a base of 5% of membership fees for general retention and recruitment initiatives. This is clear and straightforward.
- **Earning Additional Percentages for Contacting and Renewing Members:**
  - o **2.5% for Activity:** Units can earn up to an additional 2.5% for actively contacting lapsing and at-risk members and logging these actions in the Return to the Fold tool.
  - o **2.5% for Successful Renewals:** Up to another 2.5% can be earned based on the success rate of renewals of these contacted members.
- **Earning for Recruiting New Members:**
  - o Up to an additional 5% can be earned for successfully recruiting new members into the unit.

### Can you earn a percentage of the 2.5% or 5%, or is it all-or-nothing?

Based on how much of the goal is met, the unit may receive a smaller amount of the 2.5% or 5%. The chart below shows the breakdowns of what you will receive in each category based on your performance.

Performance Drivers: (on top of Base: 5%)

2.5% Retention: (contact activity) Target: 1.5% of Unit membership/month	2.5% Retention: (relative to unit membership) Quip 12 Month Losses as Pct of Attendance	5% Recruit: (relative to geographic footprint) Quip 12 Month New Members as Pct of Pre-Covid
Grade Pct1.5 Pay	Grade PctCovid Pay	Grade PctCovid Pay
😊 100 100	😊 0 100	😊 100 100
😬 90 90	😬 5 90	😬 90 90
😬 80 80	😬 5.5 80	😬 80 80
😬 75 75	😬 6 50	😬 75 65
😬 70 50	😬 6.5 25	😬 70 50
😬 0 0	😬 7 0	😬 65 0

### **How are the retention goals calculated?**

The retention goals are relative to your unit's current membership. To receive the credits for the activity-based 2.5%, the unit must reach out to those on the list (1.5% monthly of the total unit membership) and update the Return to the Fold tool.

### **How are the recruitment goals calculated?**

The recruitment goals are based on how each unit performed in December 2019 (pre-Covid).

### **Do Guest Memberships qualify for the recruitment number?**

No. The new memberships must be regular paid memberships.

### **What is the Return to the Fold tool?**

Return to the Fold is a web-based, interactive tracking tool that the unit can use and will also help the ACBL update its database.

In each unit's Return to the Fold dashboard, you'll see a list of lapsing and at risk members that is updated each quarter. Alongside the member's name is their phone number and email address so that the unit can reach out (phone call is usually more successful).

Also next to the name is a drop-down menu where the unit can log the action taken and results from reaching out (e.g., Left voicemail, plans to renew, doesn't play bridge anymore, etc.). In this drop-down menu is also an option for Need Help from HQ in case there is a payment error or change in information. Taking this will automatically send a note to the ACBL's membership department. **Choosing and submitting an action in this menu is how you will receive credit for activity.**

If the unit chooses to email the member instead of call, the tool allows you to generate an email with an automated message that you can send through your personal account.

### **Do I have to use Return to the Fold?**

Yes. Units will only receive credit for its retention activity by selecting a status in the drop-down menu next to each name in their Return to the Fold dashboard.

### **What are "lapsed" and "at risk" members?**

"Lapsed" members are members in the unit who have lapsed in the past 3 months. "At risk" members are members who have fewer than 5 masterpoints and have not played in last 3 months.

### **How often does the information in Return to the Fold update? Who can see the updates?**

Status updates for individual members are instantly displayed after submission through the tool. A member's actual renewal is updated nightly. New lists of members are produced each quarter. Anyone with the specific unit link to the tool will see any change instantly. The ACBL will also be able to see the activity units take.

### **How do I access my Return to the Fold tool? Who can access it?**

In 2023, an email with a link specifically for the unit was sent to each unit's officers. The link sent to you is specific to your unit. Please contact the ACBL's Club and Member Services department ([club@acbl.org](mailto:club@acbl.org)) if you need your link.

Whoever you share the link with can use the tool, but the ACBL recommends limiting it to unit officers.

**How can I tell what the unit's goal is and if we have met it?**

This information will be found online in the unit's report page, found at <https://cloud.bridgefinesse.com/555Dashboard.html>

Just scroll down to the Detail by District/Unit section of the page and put your unit number in the box at the top of the Unit column. Hovering your mouse over each column header will give you an explanation of what that column is displaying.

**What if I need help using Return to the Fold?**

There is both an FAQ and a tutorial video available when you log into Return to the Fold. The ACBL will be producing additional webinars.

**When will the unit receive each payment?**

At the end of each quarter.

**When does this program go into effect?**

The 2<sup>nd</sup> quarter of 2024 (April 1, 2024). The first payment will be July 1, 2024.

**How else will the ACBL help with retention and recruitment programs at the unit level?**

The Cooperative Advertising Program (CAP) is available, which allows units to receive a partial reimbursement for qualifying ads for programs aimed at recruiting new members. Qualifying ads must be date-specific for an event and include the required CAP logo. Reimbursements will be 50% of the cost with a maximum of \$500.

Additionally, the ACBL will be sharing best practices of successful recruiters in future unit president meetings, which are held monthly.

The ACBL will also be supplying brief scripts that units may use in their outreach phone calls.