

Membership Drive Planning Template

Set a target, pick tactics, track prospects, and run the follow-up that actually converts.

Club name

Drive dates (start – end)

Drive coordinator

The goal

	Number
Current active members	
New member goal for this drive	
Prospects needed (plan on 3-4 per new member)	
Guests at events needed (plan on 2 per prospect)	

Target audiences

- ☐ Friends, coworkers, and neighbors of current members
- ☐ Parents connected to youth programs we serve
- ☐ Local professionals and business owners
- ☐ Recently retired community members
- ☐ Volunteers who helped at our events but never joined
- ☐ Former members worth re-inviting

Tactics and owners

Tactic	Owner	Deadline	Status
Each member invites one guest to a specific meeting			
Open house or signature event with public invitation			
Social media and local press announcements			

Tactic	Owner	Deadline	Status
Flyers / outreach at community locations			
Re-invite lapsed members personally			
Update club website so prospects who look us up say yes			

Prospect tracker

Prospect	Source / invited by	Status	Next step and date

The follow-up cadence

- 1 Within 48 hours of a visit: personal thank-you from the member who invited them, plus one specific next invitation
- 2 Within one week: invite to a service project or social – something with a job or a story, not just another meeting
- 3 After a second touch: the membership conversation – costs, expectations, and how to join
- 4 After joining: start the new member onboarding checklist immediately

After the drive

New members gained

What worked (do more of this)

What didn't (stop doing this)

Prospects still warm for next time

Tip. Prospects will look your club up before they visit. If the website shows last year's officers and a dead calendar, the drive is leaking before it starts.