



District 5130 Strategic Plan

Rolling 3-Year Plan and District Governor Goals

2026-2027

Prepared as a final planning document with KPI dashboard, roadmap, and quarterly review cadence.

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Executive Dashboard

Strategic Priorities
4
 RI-aligned goal categories

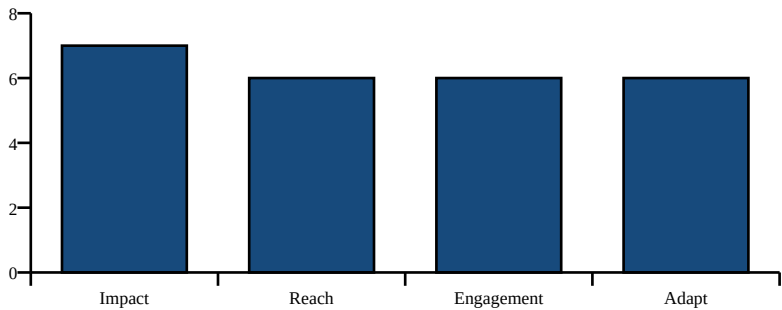
DG Goals
3
 2026-2027 signature goals

Active KPIs
25
 Strategic + DG measures

Planning Horizon
3Y
 2026-27 through 2028-29

District 5130's 2026-2027 plan is organized around Rotary's four strategic priorities: Increase Our Impact, Expand Our Reach, Enhance Participant Engagement, and Increase Our Ability to Adapt. The District Governor's three signature goals - completing all club visits, growing membership by 23, and achieving 66% club adoption of DACdb IGNITE - are embedded in the KPI register so they can be reviewed at the same rhythm as the rolling three-year plan.

Active KPI Count by RI Strategic Priority



District Governor Goals for 2026-2027

1. Visit all 46 Rotary clubs and 1 Rotaract club in District 5130.
2. Achieve a net increase of 23 Rotary members by 30 June 2027.
3. Implement DACdb IGNITE with 66% club adoption by 30 June 2027.

Dashboard rule: DG goals are not separate from strategy; they are tracked as measurable KPIs inside the relevant strategic priority.

Quarterly Review Cadence



Mission, Vision, and Strategic Framework

Mission / Guiding Statement	Provide service to others, promote integrity, and advance world understanding, goodwill, and peace through fellowship. District 5130's local emphasis is to grow Rotary by adding net new members and helping each member find the right place to contribute talents, resources, and leadership.
Goal Categories	Expand Our Reach (Membership Goals); Increase Our Impact (Financial and service impact goals); Enhance Participant Engagement (Service and member experience goals); Increase Our Ability to Adapt (Strategic planning and sustainability goals).
Operating Premise	Happy, fulfilled Rotarians drive stronger retention, growth of new club models, and stronger partnerships in communities and around the world.

RI Priority	District Planning Question	3-Year Strategic Focus	Example KPIs
Increase Our Impact	Where can clubs produce measurable service outcomes and tell a stronger impact story?	Coordinated club service and Foundation-supported projects.	# clubs reporting outcomes; % clubs using grants; beneficiaries/impact units; PolioPlus participation; Annual Fund contributions.
Expand Our Reach	How will District 5130 welcome more people, diversify participation, and raise visibility?	Club innovation, new club models, membership growth, and public image.	Net membership growth; new clubs/satellites/cause-based groups; active public image plans; qualified leads assigned.
Enhance Participant Engagement	What will make membership more valuable, connected, and leadership-rich?	Onboarding, retention, leadership development, and districtwide connection.	Retention rate; learning participants; onboarding process; engagement survey score; service project participation.
Increase Our Ability to Adapt	What district systems, data, and governance practices need to change for continuity?	Agile district operating model with data, succession, annual review, and process improvement.	Successor identification; process improvements; goals reviewed quarterly; data completeness; IGNITE adoption.

SWOC / Situation Assessment

Strengths	Weaknesses	Opportunities	Challenges / Risks
Strong DG line communication; active participation in The Rotary Foundation; successful District Learning Assemblies and District Conferences; effective District and Global Grant program.	Long, narrow geography along the Northern California coast separates north and south clubs; many district committees have only a chair or small volunteer base; recruiting committee chairs and future District Governors is challenging; district identity is not equally strong in every community.	Increase visibility of club work through social media; develop leadership programming; use World Polio Day Relay, Epic Day of Service, and A Simple Gesture to strengthen impact and visibility; ask committee chairs to recruit and develop future chairs.	Aging membership and steady small membership decline; rising cost of Rotary participation, especially clubs with meals; traditional club models may not work as effectively; social media has contributed to less civic engagement and in-person interaction.

Strategic Implications

Implication	Planning Response	Lead Role
Geography makes personal connection harder.	Use club visits, AG follow-up, shared district service days, and virtual updates to maintain rhythm across north and south areas.	DG, AGs, District Secretary
Committee bench strength is thin.	Track successors and committee member recruitment as core adaptability KPIs.	DG line, Committee Chairs
Membership requires both attraction and retention.	Pair the +23 net growth goal with retention, onboarding, lead assignment, and engagement survey KPIs.	Membership Chair, Retention Chair
Public image can accelerate membership and service.	Measure active public image plans, impact stories, and project visibility, not just attendance.	Public Image Chair, Service Chairs

District Governor's Goals for 2026-2027 - KPI Integration

DG Goal	Target by 30 June 2027	Core KPI	Milestones	Owner
Complete all official visits	46 Rotary club visits + 1 Rotaract club visit completed.	DG-KPI-01: Visits completed / 47; DG-KPI-02: Visit summaries filed; DG-KPI-03: Follow-up actions closed.	Q1 schedule confirmed; Q2 50% visits complete; Q3 80% complete; Q4 100% complete.	District Governor, AGs
Net membership growth	+23 Rotary members districtwide.	KPI-05: Net membership growth; KPI-08: Qualified leads assigned; KPI-09: Retention rate; KPI-11: Clubs with onboarding process.	Monthly membership review; quarterly club support list; intervention plan for clubs with material declines.	Membership Chair, AGs
DACdb IGNITE adoption	66% club adoption by 30 June 2027. Working target: at least 31 of 47 Rotary/Rotaract entities, or 31 of 46 Rotary clubs if Rotaract is tracked separately.	DG-KPI-04: IGNITE adoption rate; DG-KPI-05: Clubs trained; DG-KPI-06: Active users/reporting completeness.	Q1 launch/training; Q2 35% adoption; Q3 50% adoption; Q4 66% adoption.	DG, District Secretary, DACdb/Tech Lead

Visual Goal Targets

Official Visits



Target: 47/47

Membership



Target: +23 net

IGNITE Adoption



Target: 66% clubs

Recommended RAG Status Logic

Status	Definition	Action
Green	At or above quarterly target, owner has current data, no material blocker.	Continue execution and capture lessons.
Yellow	Behind target or data incomplete, but recovery is realistic within one quarter.	Assign support action, owner, and due date.
Red	Materially behind target, owner/resource gap, or deadline at risk.	Escalate to DG line/board; decide intervention or scope adjustment.
Blue	Complete or exceeded target.	Archive result, document best practice, and transition ownership.

Rolling 3-Year Goal Roadmap

Goal ID	Priority	Executive Owner	2026-27 Focus	2027-28 Focus	2028-29 Focus	Success Definition
G1	Increase Our Impact	Foundation Chair / Grants Chair	Baseline + 10% more clubs reporting impact; strengthen Foundation-supported service.	20% more clubs participating in district/global grants.	Districtwide impact story published quarterly.	Clubs can report what changed because of their service and Foundation investment.
G2	Expand Our Reach	Membership Chair	Positive net growth, +23 members, and lead follow-up system.	Launch at least one new club model.	Sustain growth and broader participation.	District reverses decline, increases visibility, and creates more ways to participate.
G3	Enhance Participant Engagement	Retention / Learning Chairs	District onboarding toolkit used by clubs; club visits used to identify engagement needs.	Leadership learning pathway deployed.	Engagement survey improvement sustained.	Members report stronger connection, more value, and clearer leadership pathways.
G4	Increase Our Ability to Adapt	DGE / District Visioning / DG Line	Quarterly strategic review begins; DACdb IGNITE rolled out to clubs.	Succession and dashboard rhythm established.	Plan refreshed for next rolling cycle.	District has current data, clear owners, succession depth, and annual plan refresh discipline.

Quarterly Review Checklist

1.	Review goal status with DG, DGE, DGN, assistant governors, and committee chairs.
2.	Update KPI actuals and RAG status for each active goal.
3.	Identify goals needing intervention, owner support, or scope adjustment.
4.	Record decisions, next actions, owners, and due dates.
5.	Refresh the rolling three-year plan annually before district team learning seminar.

KPI Register - Impact and Reach

Targets should be finalized after 1 July 2026 baseline data is confirmed in Rotary Club Central, DACdb, My Rotary reports, Foundation reports, or committee reporting.

KPI ID	Goal	Priority	KPI Name	Freq.	Owner	Baseline	2026-27 Target
KPI-01	G1	Increase Our Impact	# clubs reporting service outcomes	Quarterly	DG / Service Chair	Baseline TBD	Baseline +10%
KPI-02	G1	Increase Our Impact	% clubs using district/global grants	Quarterly	Grants Chair	Baseline TBD	+20% by Y2
KPI-03	G1	Increase Our Impact	Beneficiaries served / impact units	Quarterly	Grants Chair	Baseline TBD	Increase YoY
KPI-04	G1	Increase Our Impact	PolioPlus participation	Quarterly	Polio Chair	Baseline TBD	Increase YoY
KPI-05	G1	Increase Our Impact	Annual Fund contributions	Quarterly	Foundation Chair	Prior RY actual	\$500,000
KPI-06	G1	Increase Our Impact	# clubs contributing to Annual Fund-SHARE	Quarterly	Foundation Chair	Baseline TBD	Increase YoY
KPI-07	G1	Increase Our Impact	Club impact/Foundation incentive program created	Quarterly	DG / Foundation Chair	No	Complete by Q2
KPI-08	G2	Expand Our Reach	Net membership growth	Monthly	Membership Chair	1 July count	+23 by 30 Jun 2027
KPI-09	G2	Expand Our Reach	# new clubs / satellites / cause-based groups	Quarterly	New Club Chair	0	Add 2
KPI-10	G2	Expand Our Reach	% clubs with active public image plan	Quarterly	Public Image Chair	Baseline TBD	Increase YoY
KPI-11	G2	Expand Our Reach	# qualified leads assigned	Monthly	Attraction Chair	Baseline TBD	100% assigned within 14 days
KPI-12	G2	Expand Our Reach	Club/public visibility stories published	Quarterly	Public Image Chair	Baseline TBD	Quarterly district stories
KPI-13	G2	Expand Our Reach	Membership leads converted to guests or prospects	Quarterly	Membership Chair	Baseline TBD	Increase YoY

KPI Register - Engagement and Adaptability

The District Governor goals are embedded here: official visits, +23 membership growth, and 66% IGNITE adoption are tracked as operating KPIs.

KPI ID	Goal	Priority	KPI Name	Freq.	Owner	Baseline	2026-27 Target
KPI-14	G3	Enhance Participant Engagement	Member retention rate	Quarterly	Retention Chair	Prior RY rate	Increase YoY
KPI-15	G3	Enhance Participant Engagement	# participants in district learning	Quarterly	DGE / Learning Chair	Baseline TBD	Increase YoY
KPI-16	G3	Enhance Participant Engagement	% clubs with onboarding process	Quarterly	Membership Chair	Baseline TBD	Increase YoY
KPI-17	G3	Enhance Participant Engagement	Engagement survey score	Quarterly	Engagement Chair	Baseline survey	Improve YoY
KPI-18	G3	Enhance Participant Engagement	District award applications completed	Annual	Lt. Governor	Prior RY count	Increase participation
KPI-19	G3	Enhance Participant Engagement	Districtwide service projects created	Quarterly	DG / Service Chair	0	Create 3
KPI-20	G3	Enhance Participant Engagement	Official visits completed	Monthly	DG / AGs	0	47 visits by 30 Jun 2027
KPI-21	G4	Increase Our Ability to Adapt	% committees with successors identified	Quarterly	DG / Committee Chairs	Baseline TBD	Increase YoY
KPI-22	G4	Increase Our Ability to Adapt	# process improvements completed	Quarterly	DG / District Board	Baseline TBD	Increase YoY
KPI-23	G4	Increase Our Ability to Adapt	% goals reviewed quarterly	Quarterly	DG	0	100% each quarter
KPI-24	G4	Increase Our Ability to Adapt	Data/reporting completeness score	Quarterly	District Secretary	Baseline TBD	90%+ complete
KPI-25	G4	Increase Our Ability to Adapt	DACdb IGNITE adoption rate	Monthly/Qtr	DG / District Secretary	0	66% by 30 Jun 2027

2026-2027 Action Plan Matrix

Quarter	Priority Actions	Primary Owners	Evidence of Completion
Q1 Jul-Sep	Confirm club visit schedule; launch IGNITE training; establish baseline data; assign membership leads; confirm quarterly review calendar.	DG, District Secretary, AGs, Membership Chair	Visit calendar; baseline dashboard; training roster; lead assignment report.
Q2 Oct-Dec	Complete at least 50% of official visits; reach 35% IGNITE adoption; review membership trend by club; publish district impact story.	DG, AGs, Public Image, Membership	Visit reports; adoption report; membership analysis; published story.
Q3 Jan-Mar	Reach at least 80% of visits; expand onboarding toolkit use; identify successor gaps; strengthen club support for at-risk membership trends.	DG Line, Learning Chair, Committee Chairs	Visit tracker; onboarding report; succession tracker; intervention list.
Q4 Apr-Jun	Complete 47 visits; validate +23 member goal; certify 66% IGNITE adoption; close action items; refresh 3-year plan for transition.	DG, DGE, DGN, District Board	Final dashboard; membership report; adoption report; transition memo.

Owner Expectations

Role	Expected Cadence	What to Bring to Review
District Governor	Monthly operating check-in; quarterly strategic review.	DG goal progress, club visit insights, decisions needed.
Assistant Governors	Monthly club pulse update.	Club risks, wins, follow-up items, membership/engagement exceptions.
Committee Chairs	Quarterly KPI update.	Actuals, status, blockers, resource requests, next actions.
District Secretary / Data Lead	Monthly dashboard update.	Data completeness, IGNITE adoption, unresolved reporting gaps.

Data Sources, Definitions, and Notes

Data Source	Use	Owner
Rotary Club Central / My Rotary	Membership counts, club goals, service reporting, Foundation activity as available.	DG, Membership Chair, Foundation Chair
DACdb / IGNITE	Club adoption, club contacts, engagement workflows, and district-level reporting.	District Secretary / Technology Lead
Foundation Reports	Annual Fund, SHARE, PolioPlus, grants, and club participation.	Foundation Chair / Grants Chair
District Survey / Committee Reports	Engagement survey score, onboarding process adoption, service project participation, committee succession.	Committee Chairs
Governor Visit Tracker	Official visit status, visit summary, club opportunities, follow-up actions.	DG / AGs

KPI Definition Standards

- Every KPI should have one named owner, a reporting frequency, a data source, a baseline, a target, and a RAG status.
- Use raw counts for operational targets such as visits completed, clubs trained, and leads assigned; use percentages where club participation or adoption rate is the real measure.
- When districtwide totals are used, record whether Rotaract is included, especially for the IGNITE adoption target.
- Quarterly review notes should include decisions, not just observations.

Source Notes

This final document was prepared from the uploaded District 5130 Strategic Plan Rolling 3-Year Goals Template, including the dashboard, mission and goal categories, SWOC assessment, rolling 3-year goals, KPI tracker, and RI strategic priority working guide. The District Governor's 2026-2027 goals are integrated into the final KPI register and action plan. For publication, use official Rotary logo files from the Rotary Brand Center and review final logo placement against current brand guidance.

Recommended AI disclosure line for publication: Drafted with AI assistance and reviewed by District 5130 leadership.