

WALLY BYAM CARAVAN CLUB
INTERNATIONAL,
INC.



REGION 7
UNIT PLANNING GUIDE
WBCCI's recommended scope of
service for units.

Unit Name:

Unit President:

August, 2016

Unit Planning Guide

OBJECTIVE:

To assist Units in planning and setting annual goals; to develop effective and well-managed Units; to serve as a tool to gather and share information on successful activities

SCOPE:

The Unit Planning Guide has two major categories:

- Operation of an Effective Unit
- Member Services

I. Operation of an Effective Unit

1. Goals

- Establish goals for the year to meet Unit and International objectives. Publish in Unit newsletter. (See Objectives in Unit and International Constitutions.)

2. Unit Leaders - The following positions have been recognized as being beneficial to the unit:

- President
- First Vice President
- Second Vice President
- Third Vice President
- Corresponding Secretary
- Recording Secretary
- Treasurer
- Trustee/Director – up to 4
- Caravan Chair
- Constitution & Bylaws Chair
- Ethics & Grievance Chair
- Family & Youth Chair
- Web Master
- Newsletter Editor
- Membership Chair
- Publicity Chair

3. Unit Leadership

- Develop and maintain job descriptions for Unit officers and committee chairs
- Conduct required Unit board meetings.
- Conduct an annual planning meeting where incoming officers plan for the coming year.
- Officers attend annual delegates meeting
- Officers attend Region Board of Directors meeting

4. Unit Communications

(Frequent communications help to keep members involved.)

- Publish a Unit newsletter. (Suggested minimum of 6 issues)
- E-mail a copy of Unit newsletter to headquarters and Region Officers
- Forward Region & International newsletters to members
- Publish annual calendar of upcoming Unit rallies, dinners, caravans, meetings and events.

- Provide Unit members with board meeting minutes after each meeting.
- Publish annual Unit membership directory.
- Complete and submit “Activities Schedule For Directory and Blue Beret Form” to WBCCI Headquarters, Region President, Region VPs
- Complete and submit “New Officer Reporting Form” to WBCCI Headquarters, Region President, Region VPs
- Submit article to Blue Beret magazine or other RV Publication.
- Submit Unit pictures (without article) to Blue Beret magazine for publication.
- Recognize Unit or individual accomplishments at State, Region or International

5. Membership Promotion

(See Membership Manual, Appendix #14, Blue Book.)

- Conduct new member recruitment campaign. (Identify and contact prospective members, including “Members At Large,” living in your service area. List of MAL’s available by ZIP code from headquarters.
- New Unit Development (aiding the development of a new unit).

6. Member Retention:

- Conduct new member orientation.
- Survey members annually. (Ask what activities they would enjoy doing.)
- Increase member involvement on committees, board or Unit activities.
- Adopt “mentoring” program for new members. Pair new members with current active members for one year.
- Pass out “five year Anniversary Stars” to qualifying members. (Usually first rally after January 1st)
- Use telephone or e-mail system to remind members of upcoming activities.

7. Financial Management

- Prepare annual budget for Unit’s fiscal year.
- Publish annual financial statement for members.
- Report Unit financial status at each official meeting.
- File Federal Income Tax Return. (U.S. Units only)(Note: All U.S. Units are **required** to file either IRS Form 990, Form 990T or Form 990N each year. See Blue Book Appendix 7 for more information.)
- Conduct fiscal year-end audit or member review.

8. Public Relations

- Send “Unit Media Kit,” or other type press release, to local media to advertise Unit rally or event.
- Serve as a resource to the community and local media on camping issues.
- Unit has brochure advertising their Unit.

9. Airstream Dealer Relations

- Develop friendly dealer relations. Ask each area dealer to provide bulletin board space for Unit newsletters and notices. Mail Unit newsletter to each dealer. Meet with dealers frequently to develop areas of mutual benefit. (i.e. Unit newsletter advertising, door prizes, parts discount, dealer speaker for rally, display new Airstream products at rallies. Unit can provide WBCCI membership video, bulletin board and Blue Beret magazine for waiting room, etc.)

10. Web Site

- Maintain a Unit web site. (Suggestions: List current officers, membership chair contact information, rally dates, caravan and dinner schedules (Link to WBCCI & Region website.)

11. Committee Chair Training:

- Attend annual unit officer or committee chair seminar training program at Provincial, State, Region or International rally.

12. Constitution and Bylaws – Required

- Maintain up-to-date CBL. Send Unit Constitution and Bylaws to International CBL Committee for approval every five years. Send annually if revisions are made.

13. Blue Book Update

- Maintain at least one up-to-date Blue Book for officers. (Use online copy?)

II. Member Services

1. Rallies

- Unit Rally Only Includes Weekday--Weekend
- Buddy Rally (limited to two rallies or 50% per year)
- Children/Grandchildren's Rally
- Joint Rally with another Unit
- Installation Rally and/or Dinner (Note: This is a special occasion. Officers being installed are encouraged (not required) to wear the official uniform with Blue Beret.)
- Host or Sponsor a Special Event Rally, Region Rally or National Rally
- Volunteer at Provincial, State, Region, Special Event or International Rallies. Educate members annually about volunteer opportunities at all non-unit rallies.
- Host pre-rally for region or national rally (must be open to all members).

2. Dinner/Luncheon/Breakfast Meetings

- Provide a Unit meal function on a regular, seasonal or special event basis.
- A separate Unit meal served at a national, region or state rally
- "Snowbird" meals if Unit members seasonally gather in another place. The meal should be reported or announced in the Unit newsletter.

3. Unit/Region Caravans

- Sponsor or participate in a caravan that has been approved by the Board of Directors and recorded in the Board minutes (Being recorded in the minutes provides the club insurance coverage. See Caravan Handbook).

4. Promote Flying of National Flags

- Make national flags available to members. (Inventory in the Unit at least one national flag for member purchase.)
- Promote flying of national flags at rallies

5. Community Service

- Participate in at least one local community or national WBCCI charity activity as a Unit. For example, adopt a Highway program, local blood drive, local food bank, warm hats, pull tabs, Common Cents for Kids, etc.

6. Unit Yearbook

- Prepare a Unit Yearbook for each calendar year documenting Unit activities with pictures and text. (May be entered in the Yearbook competition at the International Rally)