

# WBCCI Unit Planning Guide

(Issued 4/30/2018)

## A. Organization

### 1. Goals

- Establish and share unit goals.
- Unit goals should include improvements in several topical areas in this Unit Planning Guide.
- Make the goals measurable and achievable.
- Remember to limit the number of goals to a reasonable number.

### 2. Leadership

- Engage leadership team in planning for year.
- Spread leadership among many, rather than a few wearing many hats.

### 3. Communications with Central Office

- Unit New Officer Reporting Form - **Deadline November 1st.**
- Blue Beret Activities Form for Blue Beret - **Deadline December 15th.**
- Blue Beret / News and Views Input and photos (higher resolution is better)  
Submit stories and articles to publications @wbcci.org  
Photos should be emailed to [office@wbcci.org](mailto:office@wbcci.org)  
(include description, member names, location, and dates)
- Confirmation that Income Taxes have been filed.  
Have completed Form 990 - **Normally by May 15th**
- Submit Financial Accounting of Funds (Bylaws Article XVI) - **Normally by May 15**

### 4. Leader Involvement

- Leadership is trained at unit, region, or international events.
- Leadership participates in Region Board Meetings and International Delegates Meeting.
- Should be in job descriptions of incoming VP, Treasurer to get trained; usually training sessions are held at Region or the International Rally
- Unit President or designate for Region Board and International Delegates Meeting.
- Formal process and notification for back-up at International.
- Proposals that require a vote at the International Delegates Meeting will be distributed to the unit members well before the meeting.
- This gives the Unit President time to solicit feedback from their Executive Board and/or Members, as appropriate and as outlined in the Unit by-laws.
- It can also be wise to obtain a proxy from the members that if a proposal is altered in the meeting, the President or delegate is free to do the best they can to vote in accordance with their membership.

## 5. Communications

- Communications are frequent, formal, informal, and meet needs of members.
- Webmaster for Web page development and updates
- Various ways are likely to be needed, including:
  - Facebook
  - Email
  - Newsletter
  - Snail mail (while many new members are happy to work on line, there are also going to be members without email addresses or an ability to work on line effectively)
- Entering communications into the contests at International Rally is a good way to get feedback and see what other local clubs are doing.
- In unit by-laws the requirements for business meetings will be established (or in Blue Book). It is a good way to share information AND get feedback on how communications are meeting the needs of members.
- Communications should include committee reports as appropriate, especially Treasurer and Membership.

## 6. Promotion

- Publicize activities to unit members.
- Help Rally Host contact / update / inform and promote rally to membership.
- Update Central Office calendar and details.
- Publicize events through / with local Airstream dealer.

## 7. Membership

- Encourage members to welcome and get to know new members.
- Chair and members involved with absentee members.
- Encourage / invite first time attendance.

## 8. Financial Management

- Financial reports are shared with members.
- Budget is developed for expenses, using prior year reports.
- Develop plan for reducing excess bank balance...within Bluebook and unit Bylaws guidelines for spending.
- File Income Tax Return each year.
- Send financial report to the Central Office each year.

## 9. Public Relations

- Communications via conventional media and social media regarding upcoming and past events.
- Let Airstream owners and potential owners know about fun, friendship, and adventure.
- Publicize activities through local Airstream Dealer.
- The media kit from HQ makes this easy to do - to provide information to a local newspaper, for example

#### 10. Dealer Relations

- Help your dealer sell Airstreams and your unit.
- Provide information on Unit, Region, and International Activities.
- Keep information stocked and current.
- Offer to hold a rally or provide representatives at dealer sponsored events.
- Invite dealer participation at Unit and Region Rally.
- Link unit with dealer web page and social media.
- Link dealer web page on unit webpage and social media.

#### 11. Web Page

- Attractive, up to date, active links,
- Webmaster informed with all communications.
- Post photos
- Maintain a current calendar of events.
- Password protect personal information
- Good idea to have the current executive board contact list

#### 12. Social Media

- Utilize AirForums, Facebook, Twitter.
- You may need multiple members to take responsibility.
- Post photos, photos, and photos.
- Encourage active member participation

#### 13. Newsletter

- Print and / or electronic form.
- Timely content with details and photos.
- Copy Region officers and Central Office.
- Copy Publications Chair
- Make copy available on Unit Website (absent any personal information)
- Distribution may use Dropbox, e-mail, e-mail link, Constant Contact, Mail Chimp, etc.

#### 14. Directory

- Optional: Protect personal information and allow members to opt out.
- Print and / or electronic form
- Include all contact information, especially e-mail address.
- Optional: Password protect electronic access.
- Electronic form can be downloadable to pdf for computer and cellphone.

#### 15. Training

- Offer training / briefing to Rally Hosts, incoming unit leaders, those potentially interested in future opportunities.
- Offer Information sessions to new members, buddies, and visitors from other units.

#### 16. Constitution and Bylaws

- Updated to reflect current C&BL every 5 years.
- Approved by membership
- Submitted for approval by International C&BL Committee.

## 17. Blue Book Use

- New and prospective leaders are familiar with Blue Book, Unit Constitution, and Unit Bylaws.
- Unit C&BL Chair is available to help with questions, interpretations, etc.

## 18. Unit Promotional Items

- Make them available to members.
- Your Region President can assist with obtaining approval of a Unit Flag or Unit Emblem.
- Items can include Flags, Hats, Shirts, Jackets, or Vests.

## B. Activities - plan well in advance of year. Schedule and brief outline available for Activities Schedule before start of year (**Deadline December 15th**).

### 1. Rallies

- Rally planning should be distributed among many members of the unit.
- Rally planning should be started in the summer for the following year – be aware of dates when campgrounds can start to be reserved in the area – often state parks can be reserved as far ahead as 9 months.
- Individuals can host rallies or the unit can set up all pot luck rallies, scattered throughout the geographic area of the unit. The unit officer(s) can reserve sites and members can sign up online.
- Rally schedule and theme should be developed before the start of the year. Many units have this as a VP job description item
- Location, dates, and signup information are included on the Blue Beret Activities Form (by December 18th) if available.
- Rally detail not available for the Activities Form can be shared with unit members by many forms of communication and a critical change, e.g., dates, should be copied to HQ.
- Units may wish to utilize several online camping websites such as RVparkreviews, Allstays and Campendium, among others, to identify positively ranked campgrounds
- Rallies can be held at state, county, city and private campgrounds
- Rallies can be arranged around specific events happening in the area or holidays such as Cinco de Mayo or St. Patrick's Day
- A rally can be quite structured with lots of things going on or much more relaxed with few things scheduled or anything in between
- Meals can range from all potluck to host supplied meals to catered meals to reservations at local restaurants. No one should be discouraged from hosting a rally due to lack of cooking skills.
- Rally schedule should be announced near the first of the year and expectations can be built in newsletter prior to the first of the year for the release date of the rally schedule.
- Online registration is easy and quick and the WBCCI software is made to build a spreadsheet that is very usable
- "Flash rallies" can be added to the rally schedule if an individual wants to get one started independent of the established schedule. For flash rallies, member can be told of the dates and campers can make their own reservations at the site. These are often last minute events but can be lots of fun when people have an open weekend. (Note - Unit Flash Rallies must be approved by the Unit Board prior to the event).

- Rallies can be scheduled on weekends of course, but consider mid-week rallies for folks who are retired or who can work remotely.
- Location, dates, and signup information are included on the Blue Beret Activities Form (by December 18th) if available.

## 2. Meetings

- Unit Membership Meetings must be scheduled and members must be notified as required by Unit Bylaws and Constitution. E-mail and Newsletter are acceptable forms of communication.
- Unit Board Meetings should be open to the membership, with time and location made known in advance.
- Unit Bylaws may specify a minimum number of Membership Meetings be held.
- To gather opinions from unit members when no meeting is scheduled, Survey Monkey can be utilized – there is a free version available and member can express their opinions about a variety of issues pertaining to the unit.

## 3. Sponsor / Host Events

- Units can sponsor or host Special Event Rallies.
- The National Special Event Chair can assist with arrangements.
- Units are encouraged to assist or host Region Rallies and to assist with International Rallies in their area.

## 4. Volunteer / Assist at Events

- Unit members are encouraged to assist in the conduct of Region and International Rallies.
- In addition, National Special Event Rallies are also looking for volunteers.

## 5. Caravans

- Units are encouraged to hold / sponsor Caravans.
- Unit Caravans can be held with minimal requirements, requiring approval of the Unit Board. Document this approval in meeting minutes and / or in the unit newsletter, as it ensures the club liability insurance applies.
- Encourage and sponsor a Unit Caravan.
- Encourage members to participate in WBCCI National Caravans, and share their experience during Unit Rallies.
- National Caravan Leaders should be asked / encouraged to publicize Caravans during Unit Rallies.
- International Caravan Committee can provide advice on Unit Caravans.

C. Community Service - Units are encouraged to support local, regional, and national charitable causes. In addition, support for the charity selected by the International President is encouraged. Unit rallies may also include volunteer opportunities for members.