



Workshops and Consultations for downtown organizations 2015

Our 2015 training series highlights the people that make Main Street great: Board, Staff and Volunteers. Listed here are more than 55 training topics and a list of a wide range of consultations we have undertaken over the last dozen years for start-up or seasoned downtown organizations. We can customize all of these workshops for your specific circumstances. We present our training workshops first, then our consultations.

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Training Workshops

ORGANIZATION

Fundraising

Diversify Your Revenue Sources!

Established downtown organizations need regular, predictable income to sustain their organizations and to ensure a viable future. This fast paced workshop explains the Board's role in fundraising and how they delegate responsibilities to the four committees and staff. We will discuss the seven traditional sources of revenue for downtown organizations, with special emphasis on three sources of revenue where the organization controls both the output and largely the outcome: residential membership/investor campaigns, sponsorship and fundraising events. We will offer ideas about how to grow these three revenue sources so that they constitute 50% of the operating budget. Ideal revenue mixes at different stages of Main Street organizational development will be explored. Finally we will briefly review other options for a sustainable organization such as Business Improvement Districts and endowments. We wrap up top ten tips. Beginner level

Why Aren't You Asking for Year End Gifts?

According to Charity Navigator, your Main Street organization could be raising up to 40% of its donations during the last six weeks of the year through an effective Year End Appeal. This workshop will give you all the tools you need to implement a year-end campaign using both social and traditional media to seek support for the general operations of your Main Street organization. This fast-paced session will outline a simple ten-step process to implement a campaign starting in mid-November until December 31. We will discuss how to create a realistic goal, prepare your website for online donations, sort mailing lists, create compelling stories and letters/emails, reinforce the campaign with appropriate PR, schedule and automate thank you letter and being prepared for the last push between Christmas and New Year's Eve. This session can be a 90-minute overview or 3.5 hours in depth discussion. This workshop contains one or two small group exercises (depending on length of session) and participants will receive an extensive resource packet of materials including the PowerPoint, articles, calendar and bibliography. Advanced Level.

I Hate Fundraising! Removing Anxiety & Boosting Board Participation

This 90 minute course will help you respond to the age-old statement "I'll do anything, but just don't ask me to fundraise!" We will show you how even the most reluctant board (or committee) member can participate in the many tasks toward raising the necessary funds to operate your local Main Street organization. We will conduct a mock 20 minute training session

that you can replicate at home, about many tasks needed to raise funds. The trick is showing board members that fundraising is not only about making the ASK. Everyone can do his or her small part. In addition, by asking Board and committee members to undertake tasks they will carry out, you will get greater participation (and less anxiety) from all involved. Based on the work of Hildy Gottlieb (<http://www.hildygottlieb.org>) this workshop shows you how you can turn even the most reluctant board member into an enthusiastic worker for downtown fundraising efforts. We will supply a nifty template to use for your training session at home. Advanced level.

Make More Money from Members

For most Main Street organizations, membership or Annual Gifts are the first form of fundraising undertaken. But for most downtown organizations, it remains an undeveloped and unexploited revenue source. This session invites the audience to look carefully at their annual gifts renewal process to maximize revenue from this already committed group of supporters. For those with an admittedly weak annual giving program, we will discuss a model annual gifts campaign to boost revenue and number of donors. For those with an existing membership program, we will highlight seven easy ways to make more money from existing members during the renewal process. Finally the session will focus on revising your membership dues levels and creating giving clubs for donors at higher level to build loyalty and regular support. This session contains one exercise and participants will receive a resource packet of materials including the PowerPoint, articles, renewal calendar and bibliography. Beginner level

The Best Component Parts for Downtown Fundraising Events

Based on our work around the country, we present a quick review of seven excellent fundraising events that work for a variety of downtown organizations. These events, solely designed to raise money, are best when they are rooted in the community's special character, people and businesses. We will provide a quick review of each type of event, the revenue components, volunteer requirements to manage, time lines, and growth potential so that you can determine how to adapt these to your town. This 90 minute workshop includes two group or individual exercises and a 40 page resource packet of articles, sample files and a bibliography provided on CD. Beginner level. We offer consultations on this topic, please see the section on consultations at the end of this document.

Surviving a Financial Crisis: Strategies that Work

Is your local Main Street program suffering from budget cuts? This workshop will help you deal effectively with budget cuts from government or other sources. We will share 75 different strategies for downtown organizations to master twin vital but contradictory goals: to expand revenue sources quickly while cutting expenses. We will also discuss ways to boost cash flow and tell your story to garner support so your Main Street organization can weather the storm. Beginner level.

Creating a Fundraising Plan

As downtown programs mature, and committees seek ever-greater revenue sources to support their activities, Board members are insisting on clear, measurable fundraising plans as a means to monitor fundraising across the whole organization. This hour and a half long workshop will introduce you to the component parts of a fundraising plan and how it is integrated into the work planning process. This 90 minutes workshop includes one group exercise. Participants will receive a resource packet of materials including the PowerPoint presentation, several articles, template, sample fundraising calendar and bibliography on CD. Intermediate level.

Member Power: More Members More Revenue

Over the years, MainStreet Libertyville (IL), a 1997 GAMSA winner, had become overly dependent on one annual fundraiser and local government for more than a third of their budget. In 2007, when rain washed out the big fundraiser, and the village cut their support sharply, the organization faced certain closure. Instead, MainStreet Libertyville turned to the community to save the organization and its 67 days of well-loved downtown events. Hear about how this massive and multi-channel membership campaign came together in six weeks, and generated 1100 new members. Learn about their 87% renewal rate, and how you can recreate their success in your town. Intermediate level.

A Main Street Fundraising Event Catalogue

Many Main Street organizations rely on fundraising events to supply operating funds. Learn about more than 100 different types of fundraising events in ten different categories that are designed to raise revenue only. We will delve into the component parts of these fundraising events so that you'll know what can be donated, sponsored, offered in kind or sold to boost the net profits of these fundraising events. This session will help you freshen up tired events, or give you some new ideas. You'll learn from audience members too, who will be encouraged to add suggestions throughout the session that will be transcribed for all participants. Intermediate level.

Is an Improvement District Feasible in Your Town?

Improvement districts (BIDs) are an extremely effective method to assure that downtown organizations have appropriate funding available. But how do you start to interest both merchants and property owners to organize a non-voluntary increase in their property or sales tax dedicated for downtown services. This workshop, geared to your state's enabling legislation, will help you identify the skills, people and steps need to determine if a BID is feasible in your town so you can make your own judgment on its viability. This session can be 90 minutes or 3.5 hours in length and includes two or three group exercises depending on the workshop length. Participants will receive a resource packet of materials including the

PowerPoint, our *Main Street Now* article, checklists, state legislation, budget templates and bibliography on CD. Intermediate level. We offer consultations on this topic, please see the section on consultations at the end of this document.

Year-Long Sponsorship Packages

Learn why you should gather all of your sponsorship opportunities into one package to solicit sponsors on a yearly basis, rather than one at a time. We will review three examples of downtown year-long sponsorship packages and explain how this simple marketing effort can help you diversify your sponsorship base, gain more revenue from existing sponsors by offering more opportunities, and allow you to fine tune your sponsorship benefits across all events and programs your organization promotes throughout the year. This 90 minute workshop includes one group exercise and a 40 page resource packet of articles, three sample sponsorship packages and a bibliography provided on CD. Intermediate level. We offer consultations on this topic, please see the section on consultations at the end of this document.

The Ask: Getting Your Board Comfortable with Fundraising

Mounting a capital campaign to raise large sums to save or restore an historic building in town is hard work over many years for any Main Street organization. In this 3.5 hour session you will be introduced to the components of a capital campaign: donor cultivation, the ASK, and stewardship of the donor. We will talk about developing prospect files and the information you will need in those files. You will learn about the five different parts of the Ask, which is the “in person” approach to a potential donor to support your project. We will conclude with a short group exercise: a piece of improvisational theater to show you how to do the different parts of the ASK. This workshop includes two group exercises and a 40 page resource packet of articles, sample files and a bibliography provided on CD. Advanced level.

Board Issues

Roles of Board and Staff in Revitalization Organizations

Clear up the confusion about who does what in Main Street organizations by hosting this session. We will first discuss the legal responsibilities of all nonprofit board members, and then turn to what revitalization Board members do collectively and as individual members to support the organization. During this 90 minute session you will learn about what managers do and don't do for Main Street and other downtown organizations, and how to promote manager longevity. We will share some horror stories along the way about good boards gone bad, so that you won't make the same mistakes! A resource packet will be distributed with lots of blank forms, letters, articles, a bibliography and other information to help to boost your board and manager effectiveness. Beginner level. We offer consultations on this topic, please see the section on consultations at the end of this document.

Train the Trainer: Role of Board and Staff in Main Street Organizations

Unlike other nonprofit boards where governance is their primary job, Main Street Boards are both working and governing entities. This duality may result in mixed messages or lax oversight on the board's fiduciary duties of care, loyalty and obedience to the law. In this 90 minute workshop we will train Main Street Managers to provide some basic background about these vital nonprofit fiduciary duties, and how to convey these concepts to your board. We will supply a brief PowerPoint show that you can customize to your community, a series of articles, and a bibliography with links to additional sites so that you can hone your understanding of these concepts before you make your board presentation. Finally, we will supply you with a short take home quiz to use with your board to assure they understand their duties and their implication for day to day work on Main Street. We will all do the quiz at the end of the workshop and discuss the correct responses so that you can feel confident you can answer questions from your Board. Intermediate level.

Better Recruitment=Better Boards

This workshop explains current nonprofit best practices for the Board Nominating Committee in local Main Street organizations. Since the Nominating Committee is the only committee concerned about the organizations near term future, we will discuss who should serve on this committee, its work throughout the year, and how to organize for best results. We will use a mnemonic device PRONTO to organize this highly interactive presentation, and show how this committee should effectively identify, recruit, discuss obligations, nominate, train and orient new board members for maximum benefit. This workshop is geared for growing Main Street organizations, ready to begin to strategically add new board members to prepare the organization to on make an orderly transition toward the next phase of growth and development. This 90-minute workshop includes one group exercise and a CD full of documents and articles to use right away. Intermediate Level.

Dealing with Difficult Board Members

Based on the book by [Katha Kissman](#) this workshop helps you deal with difficult board members, whose personal relationships or habits create unpleasant or unproductive board meetings. This workshop focuses on types of board members and their behaviors so you can understand fully the implications of these behaviors on others--including you the staff member. This workshop is excellent for advanced manager training because it gives everyone at the meeting a forum to talk about their "problem" board member in a safe setting among peers without naming names. We supply advance reading and do some role playing to help managers bring the message needed to the Board President, the one most empowered to make change at the board level. Intermediate level.

Your New Board Policies Courtesy of the IRS

Recently the IRS completely redesigned the 990 form to collect much more information about nonprofit governance practices. Main Street organizations need to understand these expansive and highly technical changes and what information must be submitted. During this 90 minute session, we will review the pertinent IRS 990 form questions and definitions, and provide sample policies and documents so that you understand the IRS concerns and will be able to bring your organization into compliance. We offer consultations on this topic, please see the section on consultations at the end of this document.

How Board Members Can Retain Talented Executive Directors

Main Street Executive Director turnover is real and expensive for downtown organizations with limited funds. The “revolving door” thwarts downtown progress, and high turnover reflects poorly on your organization. We will discuss the five general reasons that Main Street managers leave their jobs, but our focus will instead be on the positive side: how Main Street Boards can retain talented Executive Directors by aggressively addressing root causes of dissatisfaction. This Crash Course, geared mainly for Board members, discusses ten actions that Main Street Boards can undertake to fundamentally slow down or stop the “revolving door” and create a healthier work/life balance for Main Street Executive Directors. We will talk about regular, quality communication between the Board President and the ED, evaluations, raises, part time staff, taking tasks away from the Executive Director, creating bonus pools, as well as encouraging vacations, conference presentations, and flex time to lessen the stress and enhance retention. Board members will leave with a list of actionable tasks that they can use tomorrow to make sure their talented Executive Director is happy and poised to stay for the long term.

Grow Your Ambassadors: Keep Former Board Members Involved

Board members rotating off your board are an often overlooked resource for many Main Street organizations. This workshop discusses a variety of methods, both formal and informal; to retain past Board members’ accumulated wisdom and good feelings about the organization so your ambassador corps grows for the good of the organization. Recent research and best practices for retaining the hearts of these good natured people, who have nobly served the local Main Street organization over the years, will be reviewed. We will show how and why to develop short individual assignments for retiring board members, as well as the Pros/ cons of establishing a formal advisory board or past board council. This workshop includes one group exercise, a resource packet of information including articles, forms and a bibliography.

Strategic Planning for Revitalization Organizations

Creating a preferred future for an organization is the goal of Strategic Planning. This session is for organizations considering whether to engage in this process. This session will help Main Street organizations identify who should be part of their strategic planning process, why their involvement is essential to healthy growth and development, and how to use the strategic planning process to propel the organization to the next level. We will discuss how to use SWOT

and focus groups/surveys of merchants, consumers and property owners to inform your strategic planning process. We will discuss the typical parts of a strategic plan; how long your board should devote to its preparation, and how you should use the final document for public relations, fundraising, and business and volunteer recruitment purposes. This session can be 90 minutes or 3.5 hours in length. We can also facilitate strategic planning sessions, please see the section on consultations at the end of this document.

Surviving and Getting Ahead of a Financial Crisis: What Downtown Organizations Need to Know

This half day workshop is organized in two parts. The first hour and a half discusses how downtown organizations facing funding cuts from 5 to 20% should approach the twin goals of cutting expenses and raising revenues to create a viable organizational budget. Our focus is getting the Board involved in decision making on cuts as well as revenue increases. We will discuss three philosophies for cutting expenses, and provide 25 likely strategies for downtown organizations facing this issue. We will then go on to talk about 25 quick revenue generating ideas that can be instituted by another board team. Finally we will talk for 90 minutes about getting ahead of crisis but creating organizational reserves, boosting cash flow and instituting better financial controls. We will do one group exercise during each part of this two part presentation. We have an extensive CD of information on both topics that will be shared with each participating organization. This CD contains articles, a bibliography, sample documents, and links to other resource materials. Beginner level.

Ten Tips for Main Street Boards to Improve Manager Retention

Main Street manager turnover is real and it costs money. The “revolving door” thwarts downtown progress, and just looks bad if occurs too often. Main Street staff leaves because the hours are long, the pay is often low, appreciation can be stingy and their supervisor, the board president, rotates yearly. However, Boards can prevent some manager turn over by addressing root causes. This 90-minute session discusses ten actions that Main Street Boards can take to slow down the “revolving door” and make a healthier work/life balance for managers and Main Street Executive Directors. This workshop contains one small group exercise and participants will receive an extensive resource packet of materials including the PowerPoint, articles and bibliography. Basic Level.

Weak committees? Try Task Forces Instead

Main Street managers engage in a never-ending struggle to maintain a vibrant committee structure for their local revitalization programs. However, some towns are experimenting with the alternatives to committees, the very bedrock of the Main Street Committee system. Learn about devolving committee work into small, limited term task forces or short individual projects to help to engage more people in your organization's work. Learn how the role and activities of the Committee chair must evolve to permit these new relationships to thrive. See

why work plans are still critical to the success of these arrangements and how to create reliable reporting relationships. We will supply sample Committee chair spreadsheets to chart task force/individual project work, a realistic and new committee meeting schedule. We will also recommend how the committee chair can supervise an army of task forces and how to recognize their work, which may all happen remotely. This 90-minute session contains one exercise and participants will receive a resource packet of materials including the PowerPoint, job descriptions, committee chair spread sheet and bibliography. Intermediate Level

What's up with Business Associations?

In an extensive study undertaken in 2013 by the Delaware Valley Regional Planning Commission of the 71 suburban commercial districts in their nine county region, they learned that fully 88% of these downtown districts were unstaffed and managed by business or merchants associations—including some of the most highly successful downtowns in the greater Philadelphia region. This 60 minute workshop will talk about how these businesses associations actually work. We will talk about the motivations of merchants to form these independent entities, the mechanics of keeping records and charging dues, running events, and typical activities these volunteer groups undertake for their downtown districts. We will talk about taking formal steps of incorporating, writing bylaws and applying for tax exempt status too. This workshop will be helpful for downtowns that are interested in using the Main Street Approach but are unable to gather enough funding or the support of local government to hire a downtown manager in the foreseeable future. This workshop will help you identify key players who can provide leadership for this effort. Beginner level.

Volunteers

Alternatives to Volunteers: Interns, Community Service, Coops and Classes.

For the last 30 years, one of the Main Street Movement's bedrock values has been the use of volunteers. It is well known that volunteer pool has fundamentally changed nationwide and today's volunteers are unlikely to commit to long term projects and seem to prefer "bite sized" or "done in a day" tasks. Given this dilemma, many towns have begun to use alternatives to volunteers to implement traditional committee activities and events. We will discuss the pros cons, costs, and tasks best suited for the following eight different volunteer alternatives: paid or unpaid college/graduate school interns; college work study students; college coop study programs; individuals required to perform community service under judicial order; high school clubs or teams; Eagle Scouts; high school community service requirements and college and graduate school class projects. Finally, we will focus on the ever more pressing need for job descriptions, high quality supervision, likely contacts, feedback, and timing to use these potential workers for Main Street. This 90-minute session includes one short group exercise, articles and a template for creating job descriptions. Basic Level.

New Trends in Volunteer Management

We will provide a 45 roundup of the most recent and cutting edge information on volunteer management from recognized sources including Energize Inc., the Nonprofit Resource Center, Idealist, and 1000 Points of Light Foundation. We will do a short group exercise at the end of the workshop to reinforce some of the concepts discussed. This information will be supplied on a CD, along with any sample documents, check lists or other useful data that you can use immediately at home. Intermediate level.

Cultivating Baby Boomers as Volunteers

The seventy six million people who make up the Baby Boom generation (1946 to 1964) have begun to retire or take on part time work, leaving some time for local volunteer activities. This 90 minute workshop will help you identify how to cultivate and capture these often highly skilled volunteers and put them to work on complicated, but rewarding projects in your town. You will learn what kind of assignments appeal to this group, what recruitment and retention activities to institute, and why making the effort to change your approach to capture Baby Boomers will yield high quality results. This workshop includes one group exercise to reinforce concepts taught and a resource packet of articles, forms, and a bibliography.

Main Street Three "R's": Recruit, Retain & Recognize Volunteers

Volunteers are the lifeblood of any downtown revitalization organization. In this workshop learn about how to plan the organization's work using volunteers. Participants will learn how to create and sustain a strong volunteer corps to manage their Main Street programs. We will discuss why people volunteer, and the three basic recruitment techniques being used across the county in downtown organizations. Job descriptions for volunteer activities will be employed. Next we will focus on training techniques to assure that you retain your volunteers. Finally, we will talk about the most neglected part of the three Volunteer "R's" --Recognition--including why you must thank volunteers, three times, three ways. We will do three group activities to brainstorm ideas about how to implement aspects of a vibrant volunteer program for your Main Street program. The results from these exercises will be collected and compiled and sent to the manager. You will also receive a large packet of material with articles, forms and checklists that you can use tomorrow at home to build your volunteer corp. We offer consultations on this topic, please see the section on consultations at the end of this document.

21st Century Volunteer Recruitment

There are so many ways to recruit both live and virtual volunteers to help with your downtown work. In this 75 minute workshop you will learn about some new tools for recruitment, and why job or task descriptions are still critical to attract skilled volunteers to the cause. We will do two short exercises about how to recruit live as well as virtual volunteers. This workshop

includes a CD with the presentation, templates, letters and articles to use to develop your on line volunteer recruitment effort.

New Trends in Volunteer Recruitment

How does the Main Street movement recruit volunteers who want solely to work on projects and not attend monthly committee meetings? This workshop is designed to acquaint you with episodic volunteers, short-term helpers who want specific tasks that are easy to do and complete in short work. The new role of the committee chair will be explained, and how you job, descriptions will help get these new volunteers to volunteer again if their experience is pleasant and worthwhile. This is a 75-minute training program. We do one short exercise and provide plenty of handout materials to take home.

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Public Relations, Social Media and Advocacy

Packaging the Main Street Organization's worth

This half day workshop will teach you how to use the reinvestment statistics you already have in hand, and leverage them to attract new businesses, gain additional financial support, attract new volunteers, impress elected officials and generally use your stats to make you, and your program, more famous. We will use a group exercise to discuss easy ways to find information for your reinvestment statistics you need to collect. We will talk about using your stats to become the local expert, and getting regional and national press about your successes. We will show you how to use national stories to illustrate local impact and how to pitch story ideas regional/statewide business reporters, write op ed articles, and when to send letters to the editor. We will also talk about how to automate some of your PR tasks so you can create a schedule to promote your town with 52 weeks of good news. We will sum up by showing some great examples of how to use stats in your annual reports, annual meetings, volunteer recruitment and business recruitment packages. Intermediate level.

Making Your Statistics Memorable Using Writing, Aural and Visual Means

This half day, hands on workshop works with small teams to undertake a series of fun exercises to use common Main Street stats through written, aural and visual means. We will collect all the presentations made by the groups so you can have a veritable encyclopedia of clever ways to use your stats through visual, aural and written means. This workshop requires everyone to bring a laptop with a USB Port, a thumb drive, and their cumulative stats and some good photos of their town on their hard drive. Each group will make a presentation using a town's stats as an example for each of the three exercises. All of the brief presentations will be collected on a flash drive and entered onto a hard drive so that everyone can have access to these samples and ideas for R & D (rip-off and duplicate) purposes when they get home. We will wrap up the afternoon by preparing a mock presentation for the Governor to announce the annual state

Main Street stats. After the mock press conference, we will debrief and discuss next steps for you to use your impressive stats to best advantage. Intermediate level.

Your PR Plan

Every Main Street organization needs to build a positive public image through good public relations (PR). Learn how to shift from haphazard P.R. efforts to a strategy that puts the organization in a positive public spotlight. This interactive session covers the benefits of positive public relations efforts, effective P.R. methods and tools, and public relations strategy development. We'll review how to use media lists, social networking sites, press releases, interviews, and press conferences and other tools to steer the news your way. Learn how Main Street groups are using blogs, web sites, and social media to bring attention to their programs and touch younger people. Participants leave the 90 minute workshop with a "quick-and-dirty" P.R. plan to use immediately. Intermediate level.

50 Ways to Use the Web

There are a million ways to use websites, blogs, software programs, and social networking sites to advance your Main Street program. This 60 minute workshop is organized around the four Committees and focuses on free and low-cost resources. This fast run-through of some of our favorite web tools will permit you—whether novice, geek, or seasoned web surfer—to hone in on the best tools we have found. We supply a packet of materials listing all of the web sites we like, so that you can use these when you get home.

Overview of New and Traditional Media for Downtown Organizations

This is a review of the many types of public relations and advertising that Main Street organizations do in the course of a year. We will discuss the use of the hottest new tools for communicating about downtown including Facebook group pages, Twitter accounts, Four Square, blogs, e-newsletters, Apps (applications) for downtown tours and merchant promotion. We will talk about gathering databases, media lists, traditional mailing lists, email lists, twitter handles and phone numbers for text messages. We will not neglect traditional media, especially annual reports, newsletters, newspaper articles, advertising and special promotions on radio, TV and in monthly magazines. This session can be 90 minutes or 3 hours depending on your needs. We provide a CD full of articles, clippings, samples and exercises to assure that local programs understand

An Ideal Main Street Web Site

This workshop is designed for downtown organizations that already have a web site, but believe improvements are necessary to communicate to residents and visitors. In our consulting we have seen literally hundreds of local web sites and have screen shots from organizations, large and small. This workshop also stresses organizational transparency as a result of new

requirements from the IRS 990 informational tax return requirements. We will discuss what kinds of content you should have on your web site to meet these requirements. This 75 minute workshop is not a primer in HTML or Content Management systems. Rather it is designed to explain the content, pages and navigation that is important for visitors and residents. At the end of the workshop you will be able to visit with your web designer to create a more effective site.

Effective Public Relations for Downtown Organizations

This workshop focuses on using public relations to build a positive public image and garner resources for downtown organizations. Put your organization in a positive public spotlight by using a variety of effective P.R. methods and tools including traditional and new media to get the word out about your organization. Go beyond a haphazard PR effort and leave with a "quick-and-dirty" P.R. plan to use immediately. This session can be 90 minutes or 3.5 hours in length. We will do one exercise to promote concepts taught during the workshop, and provide a resource packet (CD) of the PowerPoint, bibliography and articles. We offer consultations on this topic, please see the section on consultations at the end of this document.

Working With Elected Officials: Advocacy for Local Main Street Organizations

Despite dwindling government budgets and little programmatic support for Main Street revitalization at the federal and state levels, local Main Street organizations must continue to cultivate and advocate to our elected officials at the local, county, state, and federal levels. Whether you are new to advocacy or an old hand, you'll leave this session understanding the importance of advocacy, how to cultivate long-term relationships with elected officials, how your organization can make a specific request, and tools to reach your elected officials at all levels.

Becoming More Quotable

This 75-minute workshop is designed for revitalization organizations that want to use their reinvestment statistics to best advantage by offering themselves to the regional and statewide media for quotes about their downtowns to discuss the local angle and implications of national news and trends. You will learn how to write an Op Ed piece, letter to the editor and some national sources to pitch your story ideas to reporters. We do one exercise and you will come home with plenty of materials to start you on the way to becoming more quotable in various media sources.

Crisis Communication: Know what to do BEFORE there is one!

Every revitalization organization has had some kind of crisis in the last six months--funding not coming through as expected, a board member resigns, staff decides to leave, a downtown fire, or other more serious issue. Organizations need to know what to do in advance of a crisis to

minimize the damage to your brand. This 90 minute workshop will help you identify some of the top vulnerabilities of your organization, give you tools to create press releases and talking points, a template for an emergency contact list and other parts of the ten step crisis plan that each organization should have. We will do two short exercises as part of this workshop, and you will come home with a draft plan to share with your board and complete in the months ahead.

Promotion

Event Lifecycles: The Power of Analysis

All Main Street organizations host special events and fundraising events as part of their efforts to raise funds to support the organization and provide reasons for people to visit the downtown. These events all have predictable lifecycles that can be charted and easily analyzed to determine where they are in the traditional marketing product lifecycle. This session will teach you about product lifecycles as they apply to the Main Street events. We will provide you with charts and assessment tools you can use tomorrow to assess how your events are doing and actions to take if the event is starting to slip in its revenue projections. We will do two short exercises during the session that you can complete when you get home. Beginner level

Design

Design Guideline Basics

This workshop provides an overview of the component parts of good quality Design Guidelines and how your Design Committee can develop a basic set of guidelines for your program if you don't have them already. In this 90 minute workshop we will talk about when design guidelines make sense for the downtown, how to work with existing historic building inventories including National Register Nominations, or state survey forms to learn about the existing architecture of your downtown. We will talk about the regulatory framework for your guidelines and how to involve city planning and historic commission staff in your work. We will supply samples of design godliness that we admire, and provide an organizing template for you to develop your own sample when you get home. Intermediate level.

History of Storefront Design

Pedestrian oriented downtowns have certain common buildings, spaces, sidewalks, parking, and other amenities common throughout the country. This 90-minute session focuses first on the downtown building, with a discussion of names and typical parts of a downtown commercial building. Next we talk about the evolution of styles on Main Street and how these buildings evolved over time. Finally we will talk about how historic buildings can be maintained.

Practical Preservation: Carrots and Sticks Tool Box

This overview is of the variety of incentives and regulations that affect historic buildings in a downtown setting. Half of the workshop is on the existing federal and state incentives available for each state, how the National Register and Certified Local Government programs work in concert with local preservation efforts. More emphasis is placed however on creating local funding, incentives and good advice for property owners who wish to undertake small or medium sized improvements. This session can be custom designed for your state, and can be 3.5 hours or a whole day and includes two group exercises. Participants will receive a resource packet of materials including the PowerPoint, *and other materials on a CD*. Intermediate level.

Creating Carrots for Preservation in Your Town

This new training session is an overview of the incentives, funding and assistance that many local Main Street organizations put in place to provide good design advice in their downtown. These carrots include public sector, private sector and local Main Street created incentives. This session can be 90 minutes one group exercise. Participants will receive a resource packet of materials including the PowerPoint, *and other materials on a CD*. Beginner level.

Curating an Authentic Downtown Experience

As the downtown-revitalization movement matures, we frequently find ourselves striving to nurture and maintain that which is authentic, quirky and inherently local about our districts. Inadvertently, we have become "curators" of buildings, spaces, and businesses as we seek to establish a compelling sense of place. This session examines the idea of commercial-district curation and helps identify the authentic in your town that must be preserved and enhanced. This session can be 90 minutes or 3.5 hours in length and is presented with Anthony Rubano, of the Illinois Historic Preservation Agency as co-presenter. Intermediate level.

Economic Restructuring

Assessing the Heritage Tourism Potential of Your Downtown

This workshop is for towns that are interested in learning how to utilize existing tourism infrastructure (hotels, attractions and recreational amenities) to boost downtown business by attracting more tourists. We will talk about taking an inventory of your tourism assets, identifying gaps in visitor amenities and how to address them. This workshop can be customized to be a 90 minute or half day event and is grounded in methodology of the National Trust for Historic Preservation's long standing Heritage Tourism program, including its 5 Principles and 4 Steps. <http://www.preservationnation.org/information-center/economics-of-revitalization/heritage-tourism/>. This workshop will show you how to create basic visitor

amenities including effective web sites for visitors, visitor brochures, directional signage/banners, retooling your events to make them more visitor oriented, creating tours and programs for visitors, starting a visitor center (even if it is your office), and creating task forces of hoteliers, attractions and existing tourism agencies to help you get started in attracting more year round visitors to your town. Advanced level.

Main Street Basic Training

Main Street 101: Introduction to the Four Points and the Eight Principles of Main Street

A basic introduction to the National Main Street Center's Four Point Approach™ in a 60 minute workshop. We touch on the origin of the Main Street movement, the eight principles of Main Street, and what the four committees do. We will discuss how to start a local nonprofit organization to organize the work of the downtown effort, and who should be invited to serve. Time will be spent discussing the roles of each of the committees and the typical first year projects they undertake. We will end with a few tips on what to do tomorrow if you are ready to start work on building a better downtown. Beginner level.

Basic Training: Organization Committee

This 3.5 hour training is for novices and those new to the Main Street Four Point Approach™. It touches on the origin of the Main Street movement, the eight principles of Main Street, and what the four committees do. We will discuss how to start a local nonprofit organization to organize the work of the downtown effort, and who should be invited to serve. Time will be spent discussing the roles of each of the committees and the typical first year projects they undertake. Building an initial budget and the pledge campaign will complete the session. We will do three group activities during the session to help you learn more about how Main Street operates. Beginner level.

Basic Training: Design Committee

This training on the role and activities of the Design Committee discusses why downtowns declined and a brief history of storefront architecture in America in an effort to introduce the committee's work. This session touches on the bedrock and importance of historic preservation in the development of the Main Street Four Point Approach™ and how it colors the way we see and think about downtown commercial architecture. The Design Committee focuses on the physical realm of downtown, including both public and private buildings, landscapes, streets, parking, sidewalks and parks in the downtown district. We'll discuss how to make downtown clean, safe and attractive using incremental progress and the methodology of the Main Street Four Point Approach™. Typical first year activities for this committee will be discussed as well as who should serve on the Design Committee. Beginner level.

Basic Training: Promotion Committee

The Promotion Committee helps bring people back downtown as a shopping and social environment for residents and shoppers from outside the community. We will discuss the role of this key committee and why it is often called the "fun" committee of Main Street. We will discuss typical projects and events that the Promotion Committee members undertake, the types of people that should be recruited to serve, and how to grow the capacity of the Committee members to take on more sophisticated projects over time. You will come away with a good understanding about the difference between a special event, a retail event and an image activity so that you can begin to develop these key activities right away. A resource packet will be distributed with lots of sample events and activities, and a bibliography. Beginner level.

Advanced Basic Training: Organization Committee

This workshop at 3.5 hours is meant for those involved in Main Street for more than three years and gives more in depth coverage of fundraising, volunteer development, communication tools, and board roles and responsibilities. The session can be custom designed to meet your training needs. Intermediate level.

Committee Training Organization 101

The Organization Committee is the bedrock of Main Street because it gathers two essential components for organizational success: Money and People! Learn about the role of this key committee during this fast paced and fun 90 minute session. We will discuss typical projects Organization Committee members undertake, the types of people that should be recruited to serve, and how to grow the capacity of the Committee members to take on more sophisticated projects over time. You will learn how this committee assists the board with fundraising; recruits, retains and rewards volunteers and presents the program to the public by using traditional and new media. A resource packet will be distributed with blank forms, letters, articles, a bibliography and other goodies to make your Organization Committee great! Beginner level.

Committee Training Design 101

The Design Committee focuses on the visual impact of the downtown: how clean, safe and attractive it is for shoppers and residents. Learn about the role of this key committee during this fast paced 90 minute session. We will discuss typical projects that Design Committee volunteer members undertake, the types of people that should be recruited to serve, and how to grow the capacity of the committee members to take on more sophisticated projects over time. You will learn how this committee helps to educate the community about good design, puts good design practices into place, and begins to work with merchants and property owners to encourage investment, restoration and rehabilitation in the downtown district. Historic preservation practices are stressed throughout the training. A resource packet will be distributed with articles, and a bibliography. Beginner level.

Committee Training Promotion 101

The Promotion Committee helps bring people back downtown as a shopping and social environment for residents and shoppers from outside the community. We will discuss the role of this key committee and why it is often called the "fun" committee of Main Street. We will discuss typical projects and events that the Promotion Committee members undertake, the types of people that should be recruited to serve, and how to grow the capacity of the committee members to take on more sophisticated projects over time. You will come away with a good understanding about the difference between a special event, a retail event and an image activity so that you can begin to develop these key activities right away. A resource packet includes a bibliography, articles and other materials useful for the Promotion Committee. Beginner level.

Creating a Vision Statement

Visioning is a process to identify the preferred future for your revitalization organization. Creating a vision statement does not happen during the first or even the second year of local revitalization programs because the program needs to learn what is possible with volunteer help before they can begin to dream large dreams. This workshop is best when selected community stakeholders are invited to participate (we will provide advice about whom to ask). While the local program is responsible for implementing ideas, the future vision of the downtown needs to be a shared vision with merchants, property owners, elected officials and residents to be truly effective. This workshop starts with a fun group exercise that gets everyone thinking about the future--ten years from now. From there the groups make reports and then go back into small groups again. This exercise takes about 3 hours. We provide a lively and concise statement within about a week of the workshop that describes in written form what the downtown should be like in ten years given the great work of the local Main Street program. Beginner level. We offer consultations on this topic, please see the section on consultations at the end of this document.

Creating a Mission Statement

Most revitalization programs develop a generic mission statement to satisfy their organizational documents--bylaws and incorporation papers--and then forget about this seminal statement about why the organization exists, who it serves and how it goes about its work. Our workshop helps to take an old mission statement and give it life based on the current work of the organization. This workshop can take about 2 hours and is best when it involves outside stakeholders, who buy into the work of the organization. We use some fun group exercises to get to the heart of the matter and your group ends up with a short mission statement that sings. Beginner level. We offer consultations on this topic, please see the section on consultations at the end of this document.

Hosting an Effective Meeting

We all have them--meetings--but how can you make yours better? This workshop is about an hour and we explore what makes meetings so awful and how you can shorten them, make board members more engaged, stop endless rehashing of committee work, and get the board to focus on POLICY not implementation which is the work of staff and committees. Beginner level

Main Street Manager Training

New Main Street managers need to know their role relative to the Board of Directors, since they are the managers, not the leaders of the organization. This fast paced session discusses the subtle difference between being a manager that gets volunteers to undertake the work of the organization, and doing the work yourself. We will discuss the board's role relative to fundraising, so that the manager does not take on the Board's responsibilities. This session discusses how to organize your time during the first 90 days on the job; whom to visit first; establishing relationships with merchants, property owners, elected officials and city staff. This session can be 90 minutes or 3.5 hours in length. A brief handbook of materials will be available in a CD format. Beginner level. We offer consultations on this topic, please see the section on consultations at the end of this document.

Work Plan Training

New revitalization programs need to understand the central role of the work plan in any downtown effort. This 60 minute workshop describes the component parts of the Main Street work plan, its key role in budgeting, volunteer recruitment, scheduling and evaluating committee work for the Board, staff and volunteers. We end with a hands on group exercise to create a work plan for a project selected by each group. Beginner level. We offer consultations on this topic, please see the section on consultations at the end of this document.

Organizational Consultations

Heritage Consulting Inc. offers the following consultations for downtown clients.

- a. Fundraising
- b. Board Issues
- c. Organizational Development and Transformations
- d. Audience Research

a. Fundraising Consultations

Assessments of Committee Work

Often these consultations occur to solve problems at the committee level. We gather materials in advance from staff about the current issue facing the local Main Street program. We meet with the committee responsible and with staff to assess the needs and offer new ideas and samples from other organizations to be used to help improve the performance of the local program. Sample documents are shared from other programs to help launch or improve current program efforts

Consultations and Audits of Volunteer Programs

Volunteers are critical to the success of any local Main Street program. We help towns to identify whether their volunteer recruit, retention or recognition program meets their needs. We work with the local manager and committee members charged with this important function to review current practices. We offer observations and recommendations in a brief report at the end of the consultation.

Fundraising Consultations and Audits of Current Activities

We visit with the local program, and review every aspect of their fundraising operations to offer suggestions for improvement. We receive all relevant materials in advance including membership lists, event work plans, sponsorship sell sheets and data bases that track income. We provide a list of prioritized actions that will help make the largest improvement in the least amount of time (and effort) to advance the program's cash flow.

Consultations on Membership Programs

Membership is the life blood of any local Main Street program .Whether they are called members, donors, partners or supporters, these annual gifts are critical to creating regular predictable funding for downtown work. We work with local programs to identify how their retention efforts are doing, and how they can be improved so that past efforts to recruit members can be harvested to produce continuous revenue for the organizations.

b. Board Consultations

Board Retreats

These half or whole day visits are designed to assist boards to understand current conditions and to reach agreement on new directions or long term goals. Advance work by the Board is necessary to organize a useful retreat. Heritage Consulting works closely with staff to craft an event that includes exercises or other small group projects during the event to make the retreat memorable and useful. A written report is completed at the end of the retreat.

Board Effectiveness and Evaluations

Heritage Consulting has conducted these evaluations throughout our career in Main Street work. We visit with the Board and Executive Committee to identify the specific issue(s) about which they are struggling. We identify the issue(s) and offer our observations and recommendations to improve performance. Many times the intervention revolves around poor policies or the need for training in roles and responsibilities to clear up misunderstandings and we conduct trainings if needed.

c. Organizational Development and Transformations

Bylaw Review and Update

Heritage Consulting Inc. has written bylaws for countless Main Street organizations and trained board and staff about their importance. More recently we have helped mature organizations to review and refashion their bylaws to more accurately reflect current organizational practices. We often prepare new bylaws for adoption and conduct a training session with the board to explain the new version.

Organizational Crisis and Intervention

Heritage Consulting Inc. has offered this service since the start of our work in Main Street. We have intervened in many different situations, since crisis can happen at any time. Crisis can be man-made or an act of God. But all crises have implications. Some of the issues we have consulted on include: unexpected resignations of staff or board president; discovery of financial improprieties; threats of lawsuits against the organization; sudden reversals in funding or financial support from major supporters; inappropriate board member behavior or fires, floods or other natural disasters. We visit the community and help them to sort through the problem, and identify next steps.

Mission and Vision Statement Development or Review of Existing

These basic documents need to be developed at the start of any local Main Street program. We work with local program volunteers to help them understand what these documents mean, and how they shape the future of the organization. We are also often called in to help organizations revise old mission or vision statements after about five years of work, because the organization has succeeded in its original goals and needs a more expansive vision. We work with staff to create a workshop and exercises that will be useful to chart a new future course. A short report is submitted at the end of the consultation.

IRS Nonprofit Tax Exempt Organization preparation for 501c3 designation

We coach a local volunteer to prepare the IRS form 1023 for submission to gain the 501c3 charitable status. We have also coached local Main Street organizations that are starting new or wish to change their charity designation from 501 c 6 to the more preferable 501c3. This is an

extensive consultation that can last more than three months depending on the involvement of the organization's accountant, auditor or treasurer.

Personnel Evaluations

Heritage Consulting Inc. has been called upon to help local managers to improve their performance. Often these consultants may occur over time so that the local manager is given a series of tasks to perform that will help them expand their skills or make changes in current practices. Coaching is the best means of engaging managers, and we develop individual plans for each person. A short report on goals and outcomes is produced.

Organizational Assessments and Restructuring

Often the assessment is a one day visit to a local Main Street program to assess current needs or intervene in a controversy. In some cases, the organization decides to change from one organizational form to another to achieve its objectives. We have helped organizations move from a community development organization to a local Main Street organization. Another case we recommended the formation of a business improvement district as stable funding base. These visits are often concluding with a board meeting or other kind of public meeting to offer observations and recommendations for improvement. A written report concludes the visit.

Feasibility and Creation of Business Improvement Districts

Each state offers downtown organizations the opportunity to tax property owners an small additional sum to pay for services in a designate district, over and above what is currently offered by the local municipality .We have set up two BIDs and worked with many others to understand what programs and services will do the most good to help a commercial district improve. We offer this consolation over a number of months or years and conduct surveys, interviews, focus groups and meeting with stakeholders to identify district goals and budgets. We can work with towns to conduct feasibility efforts or enact local improvement districts as needed.

Creation or Update of Strategic Plans

Strategic Plan is important documents to chart the future of nonprofit organizations. A good quality document involves surveys, interviews, SWOT analysis, and small group exercises in advance of writing the plan itself. Ideally a Strategic Plan should include all of these elements and may take several visits and up to six months to complete. More compressed versions can be devised if budgets are limited. A written report results.

Online Consumer and Stakeholder Surveys and Report

Often this survey is a component of a Strategic Plan, but it is suitable a stand-alone activity for a downtown organization. These 25 question surveys help identify what shoppers want downtown, what events are working, where shoppers get their news, demographic questions and 2 open ended questions that allow respondents to tell it like it is. Conducted entirely on line with preferably more than 400 survey respondents (to make the study statistically valid), requires the organization to have at least a 2000 name email list or very large Facebook fan base. The resulting findings report is between 80 and 140 pages depending on the sample size.

Organizational Policy Review and Update

Recent changes in the IRS 990 tax return have caused nonprofit organizations to review their internal policies. We work with organizations to help them understand what policies make sense for the size and history of their organization and how to implement. We suggest sample policies based on local needs and offer written samples for local adoption.

Annual Program Reviews or Assessments

These one day visits to local Main Street programs are designed to assess whether the local program is meeting the 10 designation criteria of the National Trust Main Street Center and to offer suggestions and congratulations for well done work during the year. These visits involve interviews, committee meetings, a tour, and board meeting to provide feedback about current work of the board and committees and to confer with the local manager, mayor and other city officials. A written report concludes the visit.

Resource Team Consultations on Organization, Promotion, Heritage Tourism and Historic Preservation Topics

These intensive level consultations provide advice for local Main Street organizations that are in the first or second year of their work. These consultations organized by a state coordinating program contain interviews, tours, committee meetings and focus groups to determine the strengths and weaknesses of local programs and to give guidance on next steps to help the organization thrive. We have provided this service as a specialist in organization, promotion, heritage tourism and historic preservation during the last five years. A written report caps the consultation.

d. Audience Research

Audience Research

These projects involve identifying and learning about the audience for a local program. This work involves interviews and/or focus groups where we ask specific questions to each group to gather opinions across a broad group of people about an issue. We work closely with the local

manager to identify the questions to be asked and prepare a report identifying the key issues and opinions uncovered.

Complete as of 1-11-2015