



Heritage Consulting Inc.

## 2020 Downtown Revitalization Workshops and Consultations

Heritage Consulting Inc. has developed a variety of interactive and engaging workshops, one-on-one consultations, and training programs for our commercial district revitalization and Main Street clients. We have produced more than 60 training topics geared for a wide range of downtown organizations, from start-ups to sophisticated business improvement districts. In the past 15 years, we have consulted with organizations and government agencies on the many ways to make downtown organizations more effective.

Our workshop and training program titles are presented below, organized by topic so you can see at a glance what might be interesting rather than scrolling through 20 pages to find what you need. I am still providing the 100-word descriptions, but that is later in the document.

You'll see these symbols:

Red are our most popular presentations

Green are excellent for quarterly meetings and annual conferences

### Training Workshops

#### ORGANIZATION

##### *Fundraising*

- Diversify Your Revenue Sources!
- Your Board's Role in Fundraising
- 135 Fundraising Events for Downtown Organizations
- Creating Year-Long Sponsorship Packages
- Seeking Big Donations? Cultivate Donors First!
- I Hate Fundraising! Removing Anxiety & Boosting Board Participation
- Make More Money from Investors and Members
- The Ask: Getting Your Board Comfortable with Fundraising

- Avoiding BID Failure
- Is an Improvement District Feasible in Your Town?
- Why Aren't You Asking for Year-End Gifts?
- Creating a Fundraising Calendar and Plan
- More Members, More Revenue

### ***Board Issues***

- Roles of Board and Staff in Revitalization Organizations
- Your Nominating Committee's Better Board Building Work Plan
- Growth to Management Phases, Making Transitions Easier
- Better Recruitment Equals Better Boards
- Ten Tips for Main Street Boards to Improve Manager Retention
- Weak Committees? Try Task Forces Instead
- Board Policies Tune Up
- Grow Your Ambassadors: Keep Former Board Members Involved
- Strategic Planning for Revitalization Organizations
- Train the Trainer: Role of Board and Staff in Main Street Organizations

### ***Volunteers***

- Volunteer Job Descriptions Workshop
- Main Street Three "R's": Recruit, Retain & Recognize Volunteers
- Alternatives to Volunteers: Interns, Community Service, Co-ops, and Classes
- 21st Century Volunteer Recruitment
- New Trends in Volunteer Recruitment

### ***Communication, Social Media, and Advocacy***

- Overview of New and Traditional Media for Downtown Organizations
- Crisis Communication: Know What to Do BEFORE There is One!
- Packaging the Main Street Organization's Worth
- A Communication Plan Update
- An Ideal Main Street Website

- Making Your Reinvestment Statistics Memorable
- Working with Elected Officials: Advocacy for Local Main Street Organizations

### *Promotion*

- Overview of Retail Events for Urban Commercial Corridors

### *Design*

- Talking Trash: 25 Ways to Make It Disappear
- Historic Preservation Basics for Downtown Organizations
- History of Storefront Design
- Design Guideline Basics

### *Economic Restructuring*

- Understanding your Transformation Strategies and Implementing Projects
- Assessing the Heritage Tourism Potential of Your Downtown
- Business Recruitment Basics

### *Main Street Basic Training for Coordinating Programs*

- Main Street 101: Introduction to the Four Points and the Eight Principles of Main Street
- Basic Training: Organization Committee
- 101 Main Street Executive Director Training
- Work Plan Training
- Advanced Basic Training: Organization Committee
- Committee Training: Organization 101
- Committee Training: Design 101
- Committee Training: Promotion 101
- Basic Training: Design Committee 101
- Basic Training: Promotion Committee 101

## ***Organizational Consultations***

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

1. Fundraising

2. Board Issues
3. Organizational Development and Transformations
4. Audience Research
5. Heritage Tourism

### **Fundraising Consultations**

- Consultations and Audits of Fundraising Activities
- Fundraising Consultations and Audits of Current Activities
- Consultations on Membership/Investor Programs
- Consultations on Operating Budget Fundraising
- Consultations on Special Event Activities

### **Board Consultations**

- Board Retreats
- Board Effectiveness and Evaluations
- Board and Officer Training
- Board Succession Planning

### **Organizational Development and Transformation**

#### *Downtown Basics*

- Bylaw Review and Update
- Organizational Crisis and Intervention
- Mission and Vision Statement Development or Review of Existing
- IRS Nonprofit Tax-Exempt Organization Preparation for 501(c) (3) Designation
- Assessment of Heritage Tourism Potential for Downtown Organizations
- Personnel Evaluations/Assessments or Hiring Advice
- Organizational Assessments and Restructuring
- Feasibility and Creation of Business Improvement Districts
- Creation or Update of Strategic Plans
- SWOO Analysis: Strengths, Weaknesses, Opportunities, and Obstacles Assessment Workshop
- Online Consumer and Stakeholder Surveys and Report

- Intercept Surveys and Report
- Assessments of Committee Work
- Consultations and Audits of Volunteer Programs
- Create or Update Vision Statement
- Create or Update a Mission Statement
- Organizational Policy Review and Update
- Annual Program Reviews or Assessments
- Resource Team Consultations on Organization, Promotion, Heritage Tourism, and Historic Preservation Topics

### **Audience Research**

- Audience Research and Report

### **Heritage Tourism Consultations**

- Consultations on Creating Heritage Tourism Strategies with Partner Organizations

### ***Design Guidelines***

- Creating Customized Design Guidelines for your Town

### **Further Information About our Workshops**

As we have done for years, we note whether these presentations are appropriate for beginner, intermediate, or advanced downtown revitalization organizations. These workshops and training programs can be as detailed as needed, tailored to run one hour to a full day, or whatever you need! They can be combined in any grouping or order as needed. We are happy to develop training programs or consultations on other topics to meet the unique needs of any coordinating program.

Most downtown management organizations, whether using the Main Street Approach Refresh or another organizing methodology, struggle to grow and thrive. Our experience with more than 200 downtown organizations nationwide in the last 25 years has given us a breadth of experience. We've consulted with organizations that are just starting out and working to advance their agenda to experienced groups that are continuing to make a difference in their community. Downtown organizations are about the people who volunteer or manage these critical enterprises. We design our training programs specifically for them.

Our workshops and consultations are excellent choices for statewide or regional conferences, group trainings, and local downtown management organizations. Our workshops are hands-

on, engaging, and fun. We include interactive learning experiences during each workshop, and share stories from our experience that offer immediate, practical solutions. During our workshops, we prefer to offer peer-learning so that the audience can learn from their contemporaries as well as from us. We provide a Best Practices Toolkit for each workshop participant. This toolkit is on a CD so it can be shared via Google Drive or other Cloud Platform, and generally includes a bibliography, relevant articles, checklists, and forms as appropriate. These resources reinforce the content of the workshop. We ask each workshop participant to complete an evaluation, so we can continuously improve our training sessions.

Following is an extensive list of all the current training workshops and consultations offered to downtown organizations. We present our detailed descriptions for our training workshops first, then our consultations in the list below.



Heritage Consulting Inc.

## **2020 Downtown Revitalization Workshops and Consultations**

### **Training Workshops**

#### **ORGANIZATION**

##### ***Fundraising***

###### **Diversify Your Revenue Sources!**

Established downtown organizations need regular and predictable income to sustain their organizations and ensure a viable future. This fast-paced workshop explains the board's role in fundraising and how it delegates responsibilities to the four committees and staff. We cover the seven traditional sources of revenue for downtown organizations and put special emphasis on three sources of revenue where the organization controls both the input 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. We will explore ideal revenue mixes at various stages of Main Street organizational development. Finally, we will review other options for a sustainable organization such as Business Improvement Districts and endowments. We wrap up with our top 10 tips. Beginner level

We offer consultations on this topic. Please see the section on consultations at the end of this document.

###### **Your Board's Role in Fundraising**

Leadership in fundraising has to start at the top. Your board sets the overall tone for any community fundraising effort, whether through a member/investor drive, seeking sponsorships, or hosting fundraising events. This crash course will encourage you to make your board's fundraising responsibilities transparent by recruiting board members who understand their fundraising obligations upfront, through a board commitment document that we will share as part of this crash course. We'll also discuss the pros and cons of selecting a specific dollar amount for board member contributions, and why 100% board participation in your annual appeal is essential. We'll also explain why you should include board gifts as a line

item in your annual budget. We will talk about whether your board should enact a “give or get” requirement, how much it should be, and how to track these contributions. Finally, we will discuss why your board president should play a leadership role in collecting board member gifts, rather than your staff. We will provide a board president job description which includes these fundraising duties that you can use to craft your own when you get home.

Beginner Level

### **135 Fundraising Events for Downtown Organizations**

Many Main Street organizations rely on fundraising events to supply operating funds. Learn about more than 130 different types of fundraising events in 10 different categories designed to raise revenue. We will delve into the component parts of these fundraising events so that you leave with ideas on donations, sponsorships, in-kind gifts, and sales to boost the net profits of your 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. A transcription of these ideas will be sent to all participants. This interactive 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.

### **Creating Year-Long Sponsorship Packages**

Learn why you should gather all your sponsorship opportunities into one package to solicit sponsors on a yearly basis, rather than a scattershot approach one event at a time. We’ll 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.

### **Seeking Big Donations? Cultivate Donors First!**

For many downtown managers, raising capital dollars for a local project is a capstone assignment, and one for which most are completely unprepared. Raising big money for



capital projects has two parts-- the perspiration behind identifying and cultivating likely prospects over time and then the art of the ASK itself. To be successful, potential donors must be cultivated—romanced—and quite a lot—before a pitch is made. Cultivation of potential donors is essential and often the weakest link in any capital fundraising program. In this crash course you will learn how to identify possible high-end donors in the area, developing prospect files and the information you will need in those files about their philanthropic interests. We will end with twelve tips on developing and deepening relationships with potential donors to increase the chance of a successful outcome for your pitch. We will supply a CD of information including articles, lists, and a bibliography. Advanced level.

We offer consultations on this topic. Please see the section on consultations at the end of this document.

### **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 about the many tasks needed to raise funds that you can replicate in your own organization. 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. 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 organization’s training session. Advanced level.

We offer consultations on this topic. Please see the section on consultations at the end of this document.

### **Make More Money from Investors and Members**

For most Main Street organizations, membership, investors, or Annual Gifts are one of their first forms of fundraising. But for many 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 levels to build loyalty and regular support. This session contains one exercise and participants will receive a

resource packet of materials including the slide deck, articles, renewal calendar, and bibliography. Beginner 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 challenging work over many years for any Main Street organization. This 3.5-hour session will introduce you 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 various 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 various 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.

We offer consultations on this topic. Please see the section on consultations at the end of this document.

### **Avoiding BID Failure**

For some Main Street organizations, establishing a Business Improvement District (BID), or whatever it is called in your state, remains the next frontier-- a Holy Grail --that will provide regular predictable funding for a local revitalization organization. BID campaigns are two years of hard effort to persuade, cajole, and motivate property owners to pay a mandatory (non-voluntary) tax assessment for additional services over and above existing city services to everyone in the district. But when a BID fails to capture the enthusiasm of the district property owners, or worse, gets voted down decidedly by city council, the roots of the BID’s failure are often sown early in the planning process itself. This session tells real stories (no names please!) about successes, failures, and stillborn attempts to enact BIDs across the country and the lessons they have taught us. We will share a *Main Street News* feature article called “Is a BID Feasible in Your Town: Ten Questions to Ponder,” and other articles and materials of interest so you can avoid BID failure in your town. Intermediate/Advanced level.

We offer consultations on this topic. Please see the section on consultations at the end of this document.

### **Is an Improvement District Feasible in Your Town?**

Business 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? We customize this workshop to your

state's enabling legislation. We'll help you identify the skills, people, and steps needed to determine if a BID is feasible in your town, so you can make your own judgment on its viability. We offer this workshop in 90-minute or 3.5-hour sessions and include two or three group exercises depending on the workshop length. Participants will receive a resource packet of materials including the slide deck, our *Main Street Now* article, checklists, state legislation, budget templates, and bibliography on CD. Intermediate/advanced level.

We offer consultations on this topic. Please see the section on consultations at the end of this document.

### **Why Aren't You Asking for Year-End Gifts?**

According to Charity Navigator, an effective Year-End appeal could help your Main Street organization raise up to 40% of its annual donations in the last six weeks of the year. This workshop will give you all the tools you need to implement a year-end campaign. We will review the use of 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 10-step process to put in place a campaign starting in mid-November lasting to December 31. We discuss creating a realistic goal, preparing your website for online donations, sorting mailing lists, creating compelling stories and letters/emails, reinforcing the campaign with appropriate PR, scheduling and automating thank your letters, and being prepared for the last push between Christmas and New Year's Eve. This session can be a 90-minute overview or a 3.5-hour 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 slide deck, articles, calendar, and bibliography. Advanced level.

We offer consultations on this topic. Please see the section on consultations at the end of this document.

### **Creating a Fundraising Calendar and Plan**

As downtown programs mature, committees tend to seek ever-greater revenue sources to support their activities. Board members often insist on clear, measurable fundraising plans to track fundraising across the whole organization. This 1.5-hour workshop will introduce you to the component parts of a fundraising plan and how to integrate it into the work-planning process. The workshop includes one group exercise. Participants will receive a resource packet of materials including the slide deck, several articles, templates, sample fundraising calendar, and bibliography on CD. Intermediate level.

We offer consultations on this topic. Please see the section on consultations at the end of this document.

### **More Members, More Revenue**

Over the years, MainStreet Libertyville (IL), a 1997 GAMSA winner, became dependent on one annual fundraiser and local government for more than a third of its budget. In 2007, when rain washed out the big fundraiser and the village cut 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 1,100 new members. Learn about the group's 87% renewal rate, and how you can recreate that success in your town. Intermediate level.

We offer consultations on this topic. Please see the section on consultations at the end of this document.

## ***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. Then we 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! We'll distribute a resource packet 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.

### **Your Nominating Committee's Better Board Building Work Plan**

Learn about the board building cycle in this session and come away with a work plan and 10 sample documents to help you build a better board of directors for your downtown organization. This presentation will review your Nominating Committee's role to identify, vet, nominate, and train new board members so that they are productive and helpful from day one. During the session, we will discuss, describe, and provide the ten resource handouts and work plan that you can customize and use immediately. A well-briefed board member will be more likely to fully participate in the work of your downtown organization immediately. We provide a CD of the ten handouts, which includes checklists, policies, samples, and charts for your Nominating Committee to use right away. Beginner level.

We offer consultations on this topic. Please see the section on consultations at the end of this documents.

## **Growth to Management Phases: Making the Transition Easier**

In 1996, Kennedy Smith chronicled how Main Street organizations evolve and change in a well-known *Main Street News* article. Smith identified three typical phases of Main Street organizational development, calling them the Catalyst, Growth, and Management phases. We know that rubric still makes sense today. This crash course uses this three-phase trajectory to help you understand what is ahead, and how to navigate the often-chaotic transitions between phases with aplomb.

We'll give a brief overview of these three phases of main street, and the lessons you need to learn to move from one phase to another. We'll share stories from our experience (no names please!) to reinforce points.

We'll spend particular attention talking about the Growth phase, usually between years four and nine, when you can expect the bulk of the private sector investment to occur in the district. Transitions between phases are often rocky, especially if your board and committees are not working at peak performance. We will explain why new board skills may be needed and how investment in staff training can provide stability. We'll provide you with work sheets on each of the three phases of Main Street that describe benchmarks, lessons to be learned, and tips to make the difficult transition between phases easier. Advanced level.

## **Better Recruitment Equals 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 it for the best results. We will use the 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 that are ready to begin strategically adding new board members to prepare the organization to make an orderly transition toward its 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.

We offer consultations on this topic. Please see the section on consultations at the end of this document.

## **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 looks bad for the organization if it occurs too often. Main Street staff leave because the hours are long, the pay is often low, appreciation can be stingy, and their supervisor, the board president, rotates yearly. But boards can prevent some manager

turnover by addressing root causes. This 90-minute session discusses 10 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. Participants will receive a resource packet of materials including the slide deck, articles, and bibliography. Beginner 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 alternatives to committees, the bedrock of the Main Street Committee system. Learn about devolving committee work into small, limited term task forces or short individual projects to help 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, as well as 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 slide deck, job descriptions, committee chair spread sheet, and bibliography. Intermediate level.

### **Your New Board Policies Courtesy of the IRS**

In 2015, the IRS completely redesigned the 990 forms to collect much more information about nonprofit governance practices. Main Street organizations need to understand these expansive and highly technical changes and ensure the correct information is being submitted. During this 90- minute session, we will review the pertinent IRS 990 form questions and definitions. We'll also provide sample policies and documents so that you understand the IRS concerns and will be able to bring your organization into compliance. Beginner level.

We offer consultations on this topic. Please see the section on consultations at the end of this document.

### **Grow Your Ambassadors: Keep Former Board Members Involved**

Board members rotating off your board are often an overlooked resource for many Main Street organizations. This workshop discusses a variety of formal and informal methods 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 and cons of

establishing a formal advisory board or past board council. This workshop includes one group exercise and a resource packet of information including articles, forms, and a bibliography. Intermediate level.

### **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. Advanced level.

We can also facilitate strategic planning sessions. 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 slide deck presentation that you can customize for 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 implications 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 feel confident when you answer questions from your board. Intermediate level.

## ***Volunteers***

### **Volunteer Job Descriptions Workshop**

Volunteers are the lifeblood of any Main Street effort. But we have learned through 20 years of experience in the field, that your volunteer recruitment efforts will be more successful if you offer short written volunteer job descriptions and post them to a variety of social media outlets. This two-hour workshop helps you create high quality volunteer job descriptions to better recruit workers to implement projects. The bulk of this workshop is a hands-on exercise

to create three types of job descriptions for volunteers based on current work plan projects. At the end of the workshop, we collect all the job descriptions that workshop participants create, so they can be scanned and circulated as a library of job descriptions to use in the future. We will also discuss how to market your volunteer job opportunities, and how to integrate new volunteers at your site to work immediately. We provide a CD with the presentation, sample job descriptions, checklists, templates, articles, and a host of other useful volunteer recruitment related materials. Beginner level.

We offer consultations on this topic. Please see the section on consultations at the end of this document.

### **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 country in downtown organizations. We'll discuss job descriptions for volunteer activities. 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 organization. We will collect the results from these exercises and send the aggregated responses to participants. You will also receive a large packet of material with articles, forms, and checklists that you can use right away to build your volunteer corps. Beginner level.

We offer consultations on this topic. Please see the section on consultations at the end of this document.

### **Alternatives to Volunteers: Interns, Community Service, Co-ops, 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 the volunteer pool has fundamentally changed nationwide.

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 volunteer alternatives: paid or unpaid college/graduate school interns, college work study students, college co-op study programs, individuals required to perform community service under judicial order, high school clubs or teams, Eagle Scouts or Girl 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. Beginner level.

### **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 online volunteer recruitment effort. Intermediate level.

### **New Trends in Volunteer Recruitment**

How does the Main Street movement recruit volunteers who want only 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. We will explain the new role of the committee chair, and how common job descriptions will help get these new volunteers to give their time 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. Beginner level.

We offer consultations on this topic. Please see the section on consultations at the end of this document.

## ***Communication, Social Media, and Advocacy***

### **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 during a year. We will discuss the use of the hottest new tools for communicating about downtown including Facebook group pages, Twitter accounts, Instagram, Pinterest, 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 the radio, on TV, and in monthly magazines. This session can be 90-minutes or three hours depending on your needs. We provide a CD full of articles, clippings, samples, and exercises to assure that local programs understand the variety of communication options available. Beginner level.

### **Crisis Communication: Know What to Do BEFORE There is One!**

Every revitalization organization has had a crisis in the last six months—funding not coming through as expected, a board member resigning, staff deciding to leave, a downtown fire, or another pressing issue. Organizations need to know what to do in advance of a crisis to minimize the damage to your organization’s brand. This 90-minute workshop will help you identify some of the top vulnerabilities of your organization and give you the tools to create press releases and talking points, a template for an emergency contact list, and other parts of the 10-step crisis plan that each organization should have. We will do two short exercises as part of this workshop, and you will leave with a draft crisis communications plan to share with your board and complete in the months ahead. Intermediate level.

### **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 effortless ways to find the necessary information for your reinvestment statistics. 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 to regional/statewide business reporters, how to 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 notable examples of how to use stats in your annual reports, annual meetings, volunteer recruitment, and business recruitment packages. Intermediate level.

### **A Communication Plan Update**

Every Main Street organization needs to build a positive public image through effective communication to the board, volunteers/committees, and the public. Learn how to shift from haphazard communication efforts to a strategy that puts the organization in a positive public spotlight. This interactive session covers the benefits of a thought out, yearlong communication plan. We will discuss effective tools including traditional and new media. We’ll review how to use media lists, a host of social networking sites, press releases, interviews, press conferences, and other tools to steer the news your way. Learn how Main Street groups are using blogs, websites, and various social media channels to bring attention to their programs and touch younger people. Participants leave the 2-hour workshop with a “quick- and-dirty” yearlong communication plan to use immediately. Intermediate level.

We offer consultations on this topic. Please see the section on consultations at the end of this document.

### **An Ideal Main Street Website**

We designed this workshop for downtown organizations that already have a website, but

believe improvements are necessary to communicate to businesses, residents, and visitors. In our consulting, we have seen hundreds of local websites and have screen shots from many organizations, large and small. This workshop also stresses organizational transparency because of new requirements from the IRS 990 informational tax return requirements. We will discuss what kinds of content you should have on your website to meet these requirements. This 75-minute workshop is not a primer in HTML or Content Management systems. Rather it is an explanation of the content, pages, and navigation that are important for businesses, 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. Beginner level.

### **Making Your Reinvestment Statistics Memorable**

This half-day, hands-on workshop utilizes small teams to work on a series of fun exercises utilizing common Main Street stats through written, aural, and visual means. We will distribute all the presentations made by the groups, so you will leave with a veritable encyclopedia of clever ways to use your community's stats through visual, aural, and written methods. This workshop requires everyone to bring a laptop with a USB port, a thumb drive, their cumulative stats, and some good digital photos of their town. Each group will make a presentation using a town's stats as an example for each of the three exercises. We'll collect each presentation and distribute them, so that everyone can have access to these samples and ideas for R & D (rip-off and duplicate) purposes when they get back to their office. We will wrap up the workshop 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 the next steps for you to use your impressive stats to your best advantage. Intermediate level.

### **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. Intermediate level.

## ***Promotion***

### **Overview of Retail Events for Urban Commercial Corridors**

Urban commercial corridors have different business mixes that tend to convenience goods rather than dining destinations. This 60-minute workshop explains how urban commercial corridors can create retail events designed to ring cash registers that day for local retailers around traditional holidays and seasonal events. We will supply samples of retail events in

NYC, NJ, and Philadelphia in urban commercial corridors and discuss how you can recreate these in your district through a work plan exercise. Intermediate level.

## ***Design***

### **Talking Trash: 25 Ways to Make It Disappear**

We all know the truism: if downtown is not clean, then shoppers just won't come. Downtown cleanliness is part of the image that we project to the world and shows how we care about our city and ourselves. But how do you begin to address the casual littering, overflowing dumpsters, short dumping in vacant lots, upswept sidewalks, and household trash in public waste baskets that makes up the wretched refuse of downtown work? This session is a fast-paced review of the three biggest trash generators in a downtown: merchants, the public, and residents in the downtown. For each group and the trash they generate, we'll discuss "carrot" strategies: designs that encourage compliance and incentives for better behavior. We will also talk about "stick" strategies, including defensive design, enforcement of existing ordinances, the creation of new ones, and public education designed to shame the offenders. In each of the sections, we will ask session participants to add to this list, and we will collect the information on a flip chart. We will compile the list, along with the ideas we present, and send all to anyone who shares their email with us within a week of the session. Beginner level.

### **Historic Preservation Basics for Downtown Organizations**

Confused about the historic preservation lingo and preservation tax credits? Don't know the difference between the National Register and a locally designated landmark? Or why Design Guidelines for matching grants for storefront rehab matter? And why does the Secretary of the Interior have standards that should be followed when rehabbing historic properties? We will clear it all up for you in a snappy presentation with a host of handouts. Beginner Level.

### **History of Storefront Design**

Pedestrian-oriented downtowns have certain common buildings, spaces, sidewalks, parking, and other amenities that are similar throughout the country. This 90-minute session focuses first on the architecture, with a discussion identifying 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 the maintenance of historic buildings. Beginner level.

### **Design Guideline Basics**

This workshop provides an overview of the component parts of excellent 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 and how to work with existing historic building inventories including National Register Nominations and 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 guidelines that we admire and provide an organizing template for you to develop your own sample when you get home. Intermediate level.

## ***Economic Restructuring***

### **Understanding your Transformation Strategies and Implementing Projects**

We work with Main Street organizations that have completed a recent market analysis or Transformation Strategy consultation with their state Main Street Program. We help the local program understand their unique opportunities to recruit new businesses based on the market strengths in the community now. We also review the current roster of promotional events to determine if they need to be reconsidered to focus on the new markets identified in the Transformation Strategy report. The Transformation Strategy Report may also identify new partnerships to explore, and we help towns to understand how to prioritize the information, make quick use of the information and reorganize promotion and special events to zero in on the new markets identified in the Transformation Strategy report. We provide a memo about recommendations and priorities to use to implement the Transformation Strategy report in the coming year. Intermediate level.

### **Assessing the Heritage Tourism Potential of Your Downtown**

This workshop is for towns 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 strategies for addressing them. Based on the methodology of the National Trust for Historic Preservation's long-standing Heritage Tourism program, we will discuss the Trust's five principles and four steps (<http://www.preservationnation.org/information-center/economics-of-revitalization/heritage-tourism/>). You will learn how to create basic visitor amenities including effective websites and brochures for visitors and directional signage/banners. We'll also cover retooling your events to make them more visitor oriented, creating tours and programs for visitors, and starting a visitor center (even if it's your office). Finally, we will discuss the creation of task forces of hoteliers, attractions, and existing tourism agencies to help you get started in drawing more year-round visitors to your town. This workshop is 90-minutes. Advanced level.

### **Business Recruitment Basics**

As downtown organizations mature, they begin to worry about the business mix downtown

and how they can influence property owners to place quality tenants in their stores. We designed this one-hour workshop for towns just thinking about business recruitment that need to gather materials together to create a compelling reason for a small business to locate to your town. We will demonstrate the creation of a simple business cluster chart to identify existing market niches, how to use the US Census materials to share your town's demographics, and finally how to package together this information into simple graphic form to hand to potential new business owners who wander into your office each week and ask how they can open their business in your downtown. Beginner level.

### ***Main Street Basic Training for Coordinating Programs \***

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

This 60-minute workshop is a basic introduction to the National Main Street Center's Four Point Approach™. 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 group to organize the work of the downtown effort, and whom you should invite to serve. We will spend time 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 101**

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 group to organize the work of the downtown effort, and whom you should invite to serve. We will spend time 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.

#### **101 Main Street Executive Director Training**

New Main Street Executive Directors 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 themselves. 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 managers should organize their time during the first 90 days on the job and whom to visit first. We will also discuss 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 significant role of the work plan in any downtown effort. This 60-minute workshop describes the component parts of the Main Street work plan and its key role in budgeting, volunteer recruitment, and 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.

### **Advanced Basic Training: Organization Committee**

This 3.5-hour workshop is well suited for those who have been involved in Main Street for three or more years. We'll have an in-depth discussion of fundraising, volunteer development, communication tools, and board roles and responsibilities. The session can be custom designed to meet your training needs. Intermediate level.

### **Basic Training: Design Committee 101**

This training on the role and activities of the Design Committee discusses why downtowns declined and provides a brief history of storefront architecture in America 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™. We will discuss typical first year activities for this committee, as well as who should serve. Beginner level.

### **Basic Training: Promotion Committee 101**

The Promotion Committee helps bring people back downtown by marketing downtown as a shopping and social environment for residents and for those 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 capability of the committee members to take on more sophisticated projects over time. You will leave 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. We will distribute a resource packet with lots of sample events and activities and a bibliography. Beginner 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 you should recruit to serve, and how to grow the capability 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 through 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 you should recruit to serve, and how to grow the capability of the committee members to take on more sophisticated projects over time. You will learn how this committee helps to educate the community about superior design, puts high-quality 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 by marketing downtown as a shopping and social environment for residents and for those 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 you should recruit to serve, and how to grow the capability 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.



## Organizational Consultations

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

- Fundraising
- Board Issues
- Organizational Development and Transformations
- Audience Research
- Heritage Tourism

## Fundraising Consultations

### Consultations on Operating Budget Fundraising

We provide consultations for local Main Street organizations to understand how they fund their operating budgets, and how to add and expand existing revenue sources. These consultations can be customized for particular concerns, such as Downtown Development Authorities that are facing shrinking budgets, or for towns that are facing sudden decline in revenue from local government, or a loss of a longstanding grant source. Our emphasis is on raising more money fast, strategically, cutting expenses and telling your story to the media to showcase how board and staff are dealing with their funding concerns. We supply a brief report or presentation about our findings.

### Consultations on Special Event Activities

These consultations are designed to review all of the special events of a downtown organization and to assess their effectiveness as promotional and fundraising activities. We review work plans for each event, the profit and loss statement over several years, and the collateral materials created for each event. We spent time to review sponsorship benefits offered and the reports sent to sponsors at the end of the event. We will seek insights from high end sponsors for particular events to gain their feedback about the event, the financial benefit to the sponsors and make any recommendations for change. We supply a brief report or presentation about our findings.

### Consultations and Audits of Fundraising Activities

Often these consultations occur to solve problems at the committee level. We gather materials in advance from staff about the current fundraising facing the local Main Street program. We meet with the committee responsible and with staff to assess needs, review work plans, budgets and volunteer concerns and offer innovative ideas and samples from our files on other organizations to help improve the performance of the local program. We share sample documents from other Main Street to help launch or improve current fundraising 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 recruitment, 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 following 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 review all relevant materials in advance including membership lists, event work plans, sponsorship sell sheets, and databases 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/Investor Programs**

Membership/Investors or Annual Gifts are the lifeblood 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 continue to produce revenue for the organization.

## ***Board Consultations***

### **Board Retreats**

We design half or full day visits to assist boards in understanding current conditions and reaching agreements 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. We compile a written report following 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) with 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. We will conduct board training if needed.

### **Board and Officer Training**

These consultations can be offered one-on-one or through small groups of current officers or

for individuals you want to train as your “bench” for future opportunities. We will spend time with board members that have not had the benefits of board training to explain their fiduciary duties as well as legal duties as stewards of nonprofit corporations for your state. These consultations will be tailored to your organizational situation, whether an officer has recently resigned or is at their end of their term. All officers will receive a CD with useful information, including a job description and policies that are appropriate for that office, along with a more thorough understanding of their unique and important role in the workings of the organization.

### **Board Succession Planning**

We highly recommend this training BEFORE the board has its most ardent supporters turn over because of the end of their board terms. This one-on-one consultation can be excellent to groom potential leadership among the board to understand their potential future role as board officers. We can work individually with potential officer candidates or with a small group to assure there is enough “bench” strength. We can work with current leadership to identify potential leadership or undertake individual interviews with board members and with key committee volunteers to identify likely prospects for board leadership in the future. We recommend sending these individuals to state and national training and can develop outside mentor relationships or field trips to area downtown organizations to have your prospects learn about organizational growth from their peers.

All succession planning leaders will receive a CD with useful information pertaining to their specific situation.

## **Organizational Development and Transformation**

### ***Downtown Basics***

#### **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 accurately reflect current organizational practices. We often prepare new bylaws for adoption and conduct a training session with the board to explain the latest 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 a crisis can happen at any time. A 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, and fires, floods, and other natural disasters. We visit the community, help them to sort through the problem, and identify next steps.

### **Mission and Vision Statement Development or Review of Existing**

It is important to create these basic documents at the start of any local Main Street program to give the organization an idea of its immediate future goals. 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. We submit a short report following the consultation.

### **IRS Nonprofit Tax-Exempt Organization Preparation for 501(c) (3) Designation**

We coach a local volunteer to prepare the long IRS form 1023 for submission to gain the 501(c) (3) charitable status if the organization is expecting more than \$50,000 in revenue over the next three years. 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 preferable 501(c)(3). This is an extensive consultation that can last three or more months depending on the involvement of the organization's accountant, auditor, or treasurer.

### **Assessment of Heritage Tourism Potential for Downtown Organizations**

Many downtown organizations believe that tourism development will bring additional shoppers into their district and make their local businesses stronger. This on-site assessment is three or four days long and includes a series of interviews with key stakeholders, several days of focus groups, four committee meetings, a board meeting, and a public presentation or press conference. The local Main Street organization provides a considerable amount of advance materials, including a GIS-based map of all hotels, restaurants, shops, and recreational facilities within five miles of the downtown. We use this as a base map for our on-site work. As a deliverable, we include a report on the results of the assessment with recommendations.

### **Personnel Evaluations/Assessments or Hiring Advice**

Heritage Consulting Inc. has been called upon to help local managers improve their performance. Often these consultations occur over time, allowing the local manager to complete a series of tasks 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. We produce a short report on goals and outcomes.

### **Organizational Assessments and Restructuring**

Often this 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. In another case, we recommended the formation of a business improvement district as a stable funding base. These visits often conclude with a board meeting or other kind of public meeting to offer observations and recommendations for improvement. We deliver a written report following the visit.

### **Feasibility and Creation of Business Improvement Districts**

Each state offers downtown organizations the opportunity to tax property owners a small additional sum to pay for services in a designated 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 consultation over many months or years and conduct surveys, interviews, focus groups, and meetings 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**

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

### **SWOO Analysis: Strengths, Weaknesses, Opportunities, and Obstacles Assessment Workshop**

Whether used as part of a Strategic Planning exercise or for taking the temperature of community residents, SWOO is a feedback mechanism that can help you get information from your stakeholders FAST. SWOO is often an evening meeting of three hours where we work with the client to identify the information they wish to gather from the meeting. We use a small group process to assure that everyone is heard and that we collect all the intelligence from the participants at the SWOO to help you make decisions. Following the SWOO, we produce a report in the form of a memo with observations and recommendations. We also include the sorted notes from the SWOO meeting. Beginner level.

### **Online Consumer and Stakeholder Surveys and Report**

Often this survey is a component of a Strategic Plan, but it is suitable as a stand-alone activity

for a downtown organization. These 25 question surveys help identify what shoppers want downtown, what events are working, and where shoppers get their news by asking demographic questions and two open-ended questions that allow respondents to tell it like it is. We conduct this survey entirely online and prefer more than 400 survey respondents (to make the study statistically valid). It is important that the organization has at least a 2,000-name email list or large Facebook fan base. The resulting findings report is between 80 and 140 pages depending on the sample survey size.

### **Create or Update 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 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 consultation is best when selected community stakeholders are invited to participate (we will provide advice about whom to ask). While the local program handles implementation of the 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 five years from now. From there, the groups make reports and then split back into small groups. This consultation takes about three hours. We provide a lively and concise statement within a week of the workshop that describes in written form what the downtown should be like in five years given the magnificent work of the local Main Street program.

### **Intercept Surveys and Report**

We work with a local community that wants to understand current shoppers and their preferences for downtown. We help communities develop a brief survey about the current special events and retail activities, local shops most requested by current patrons, shopper opinions on cleanliness, safety, parking, directional signs, holiday lighting (if any), storefront engagement, and store owner helpfulness. We collect surveys, analyze responses and create an intercept survey report with advice about making changes to meet the needs of existing customers.

### **Assessment of Committee Work**

Often these consultations occur to solve problems at the committee level. We gather materials in advance from staff about the current issues facing the local Main Street program. We meet with the committee responsible and with staff to assess needs, review work plans, budgets and volunteer concerns and offer innovative ideas and samples from our files on other organizations to help improve the performance of the local program. We share sample documents from other Main Street 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 recruitment, 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 following the consultation.

## **Create or Update 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 on why the organization exists, whom it serves, and how it goes about its work. Our consultation helps to take an old mission statement and give it life based on the current work of the organization. This consultation lasts about two 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.

## **Organizational Policy Review and Update**

Recent changes in the IRS Form 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 put these in place. We suggest sample policies based on local needs and offer written samples for local adoption.

## **Annual Program Reviews or Assessments**

We design these one-day visits to local Main Street programs to assess whether the local program is meeting the 10 designation criteria of the National Trust Main Street Center. We also offer suggestions and congratulations for well-done work during the year. These visits involve interviews, committee meetings, a tour, and a board meeting. We provide feedback about the current work of the board and committees, and 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**

Our 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 brief written report caps the consultation.

# Design Guidelines

## Creating Customized Design Guidelines for Your Town

Over the course of six months, we work with the Design Committee of a local Main Street organization to create design guidelines for their local program. Most often these guidelines help the Committee manage a storefront loan or matching grant program. We utilize *the Secretary of the Interior's Standards for Rehabilitation* as the baseline for these guidelines, whether the downtown is listed on the National Register or not. The *Secretary's Standards* provide common sense advice on maintenance of any historic building. We take photos of all of the downtown buildings and identify the boundaries of the downtown district or the storefront grant/loan program. We focus on exteriors of buildings only. We provide an outline of the design guidelines document for the committee, review all planning and zoning laws that apply to the district, and gather maps of downtown. We meet with the Design Committee or larger steering committee every other week to review chapters of the Guidelines as they are created, getting feedback about the work. Committee members are asked to supply historic photos of downtown and captions for use in the Guidelines. We supply photos of recommended and not recommended treatments with captions to illustrate specific topics at issue in the downtown and in each chapter of the Guidelines. We do not use photos of the town to illustrate "not recommended" treatments instead we highlight good restoration and rehabilitation work already undertaken in downtown. Finally when the document has been completely reviewed by the Design Committee, we work with the committee members who make a public presentation about the Design Guidelines and how they will be implemented. Often, we suggest changes to the Storefront Matching Grant Program to reinforce the role of the Design Guidelines, and its implementation.

## Audience Research

### Audience Research and Report

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 we'll ask. We follow up with a report identifying the key issues and opinions uncovered.

## Heritage Tourism Consultations

### Consultations on Creating Heritage Tourism Strategies with Partner Organizations



If you are hoping to create a new high-quality heritage tourism strategy for your larger area, this consultation will show you how to cultivate and develop new partners, especially heritage attractions nearby, to augment and highlight your own downtown efforts. You will learn how to create a tour loop of committed organizations willing to work together to promote the area together. We will help you to create a logical tour loop to bring more visitors to your downtown and therefore more economic activity into your area. We will also discuss strategies to add content to your tour loop by including historic sites not open regular hours by encouraging them to further develop their interpretive materials for visitors.

This session will also touch on the value of creating an area visitor center in your Main Street office if you don't already have one in town and asking for help from your area destination management organization. We will discuss the component parts that you will need to jointly promote your tour loop by adding downloadable tour loop guides . Walking tours are also popular as well as adding other plaques, interpretive and directional signs, and tour maps to assure that visitors want to visit other sites on the tour loop.

We'll offer tips about working with your state and regional tourism partners to integrate your new tour loop into the larger tourism context. You will leave with a sample work plan and a checklist of tools such as cross promotions, website updates, and how to use TripAdvisor and Yelp to create a buzz about your tour loop. We will show you how to create quarterly joint e-newsletters to promote seasonal events and printed collateral materials that you and your partners will need to ensure that the tour loop provides a quality visitor experience. We will provide these handouts on a CD after the consultation, along with a brief report with our recommendations.=

## **Contact**

Please contact us to discuss your training or consultation needs by email at [donna@heritageconsultinginc.com](mailto:donna@heritageconsultinginc.com) or by phone at (267) 251-5444 cell

Update January 2020