



Heritage
Consulting Inc.

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Downtown Revitalization Workshops and Consultations

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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 toward a wide range of downtown organizations, from start-ups to sophisticated business improvement districts. In the past 18 years, we have consulted with organizations and government agencies on the many ways to make downtown organizations more effective.

Our workshops and training programs 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. 100-word descriptions are provided later in the document.

The programs are coded as follows:

Red are our most popular presentations.

Green are excellent for quarterly meetings and annual conferences.

Training Workshops

ORGANIZATION

Fundraising

- Diversify Your Revenue Sources!
- NEW Turning Supporters into Donors
- NEW Planning for a Capital Campaign
- NEW Boosting Net Revenue at Fundraising Events
- Why Aren't You Asking for Year End Gifts?
- 135 Fundraising Events for Downtown Organizations
- Creating Year-Long Sponsorship Packages
- The Ask: Getting Your Board Comfortable with Fundraising
- I Hate Fundraising! Removing Anxiety & Boosting Board Participation
- Make More Money from Investors and Members

- Creating a Fundraising Calendar and Plan
- Seeking Big Donations? Cultivate Donors First!
- Is an Improvement District Feasible in Your Town?

Board Issues

- NEW All About Main Street Boards
- Roles of Board and Staff in Revitalization Organizations
- Your Nominating Committee's Better Board Building Work Plan
- NEW Effective Search Techniques for Executive Directors Today
- Ten Tips for Main Street Boards to Improve Manager Retention
- Better Recruitment = Better Boards
- Weak Committees? Try Task Forces Instead
- Train the Trainer: Role of Board and Staff in Main Street Organizations
- Getting Ready for Strategic Planning for Revitalization 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

- Packaging the Main Street Organization's Worth
- Get More National Press About Your Downtown
- A Communication Plan Update
- Making Your Reinvestment Statistics Memorable Using Written, Aural, and Visual Means
- Working with Elected Officials: Advocacy for Local Main Street Organizations
- Crisis Communication: Know what to do BEFORE there is one!

Promotion

- NEW Overview of Retail Events for Urban Commercial Corridors

Design

- Talking Trash: 25 Ways to Make It Disappear
- Design Guideline Basics
- History of Storefront Design

Economic Restructuring

- NEW Creating Revolving Fund Programs to Save Threatened Historic Buildings Downtown
- NEW Assessing the Heritage Tourism Potential of Your Downtown

- Understanding your Transformation Strategies and Implementing Projects
- Business Recruitment Basics

Main Street Basic Training for Coordinating Programs

- Main Street 101: Introduction to the 4 Points and 8 Principles of Main Street
- Basic Training: Organization Committee 101
- Main Street Executive Director Training
- Work Plan Training
- NEW All About Main Street Boards
- Advanced Basic Training: Organization Committee
- Basic Training: Design Committee 101
- Basic Training: Promotion Committee 101
- Committee Training: Organization 101
- Committee Training: Design 101
- Committee Training: Promotion 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

- Fundraising Consultations and Audits of Current Activities
- Consultations on Membership/Investor Programs
- Consultations on Operating Budget Fundraising
- Consultations and Audits of Volunteer Program

Board Consultations

- NEW Organizational Assessments
- NEW Executive Director Search
- Board Roles and Responsibilities
- Strategic Planning for Downtowns
- Board Succession Planning
- Board Effectiveness and Evaluations
- Board Retreats
- Board and Officer Training

Organizational Development and Transformation

Downtown Basics

- NEW Organizational Assessments and Restructuring
- NEW Search Process for New Executive Director
- Bylaw Review and Update
- Organizational Crisis and Intervention
- Create or Update a Mission Statement
- Organizational Policy Review and Update
- Feasibility and Creation of Business Improvement Districts
- Creation or Update of Strategic Plans
- SWOO Analysis (Strengths, Weaknesses, Opportunities, and Obstacles)
- 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
- Online Consumer and Stakeholder Surveys and Report
- Intercept Surveys and Report
- Assessments of Committee Work
- Create or Update Vision Statement
- Annual Program Reviews or Assessments
- Resource Team Consultations on Organization, Promotion, Heritage Tourism, and Historic Preservation Topics

Audience Research

- Audience Research and Report

Economic Restructuring Consultations

- NEW Creating Revolving Fund Programs to Save Threatened Historic Buildings Downtown

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—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 have consulted with organizations that are just starting out and working to advance their agenda, as well as highly experienced downtown organizations 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-to-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 comes on a thumb drive or uploaded to the State Coordinating website so you can share via Google Drive or other Cloud Platform. It 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.

The following is an extensive list and descriptions for 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.

Contact

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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 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. 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.

NEW! Turning Supporters into Donors: Increasing Financial Sustainability

This session explains the 2021 Oregon Main Street Handbook: "Turning Supporters into Donors." You will learn how to plan and implement a 12 step/12-week community-wide fundraising campaign that will convert casual supporters into ready donors. We will show how to use your board and volunteers to ask residents, shoppers, social media fans and local businesses to financially support your program. While we emphasize one-on-one fundraising, we also show how you can solicit your social media fans and downtown shoppers for support. This session can be 60 to 90 minutes depending on your needs. We will supply a PDF of the 65-page handbook, which contains 15 sample documents including fundraising letters, brochures, graphics and thank you letters. Beginner level.

NEW! Planning for a Capital Campaign

Main Street organizations wishing to own real estate do so for many reasons: to own their own office, to rehabilitate a blighted or threatened building, or to create coworking or business incubators to grow the entrepreneurial ecosystem in their community. Our 90-minute workshop introduces you to a variety of fundraising concepts including Prospecting, Cultivation, ASK, and Donor Stewardship. In each section we discuss how a local downtown organization can begin to plan for an eventual capital campaign years in advance by identifying and cultivating potential donors now. We focus on asking for small gifts to an investor campaign and keeping good records of conversations with these donors over years, before the organization is ready to make a major gifts ask for a project that might excite a donor. We end our session focused on thanking donors and how to continually involve them in the work of the organization over time. We offer a bibliography about planning for capital campaigns, samples of a donor funnel, donor pyramids, gift range calculators, and when you may need to hire a capital campaign consultant to undertake a feasibility study for your project. Advanced level.

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 30% 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 and lasting until 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/links to 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.

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 raising the necessary funds to operate your local Main Street organization. We will conduct a mock 20-minute training session about 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 fundraiser for your downtown. 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, they remain 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 the 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 levels and creating giving clubs for high-level donors to build loyalty and regular support. This session contains one exercise and participants will receive a resource packet/links to 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.

Creating a Fundraising 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/links to materials including the slide deck, several articles, templates, sample fundraising calendar, and a bibliography on CD. Intermediate level.

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

Boosting Net Revenue from Fundraising Events.

This session focuses on fundraising events and how to boost net income. We will start by describing why fundraising events should NEVER be weather dependent. We will show how a careful, thorough review of past revenue and expenses can help you to increase net income. We will use three typical indoor fundraising event types: A gala, a music event, and a cookbook to illustrate our points. We have learned that net revenue often declines at fundraising events in subsequent years because costs are allowed to increase each year by vendors, and others who offer no alternatives and why it is time to stop that. We will describe how these costs can be offset by sponsorship, barter, or donation from other entities to limit the cost creep upwards. On the revenue side, we will supply a template with two dozen fundraising components to pick from, and how many are appropriate for any one event. Finally, we will offer advice about whether it is possible (or wise) to add "premium experiences" to your event for additional net income for your operating budget. We will supply checklists for revenue and expenses and a template with two dozen fundraising components to consider for upcoming fundraising events for your public history organization.

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 will 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/links to 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.

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 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 finetune 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/links to 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 the essential and often weakest link in any capital fundraising program. In this crash course you will learn how to identify possible high-end donors in the area and develop prospect files with the information you will need 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 online links to 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.

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/links to 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.

Is an Improvement District Feasible in Your Town?

Business improvement districts (BIDs) are an extremely effective method to ensure 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 will 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/links to 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.

Board Issues

NEW Executive Director Search Demystified

It is a fact of Main Street life; Executive Directors come and go. Use this savvy search process to help hire the best person available! Start with a new and an up-to-date job description with salary range/benefits. Pick a diverse selection committee and use a rubric to sort applicants (we will show you how). We 'll supply interview and reference check questions. We suggest your final applicants present a 10-minute assessment of your downtown. It may be a revelation! Finally, end up with two final applicants and pick one. We will supply key on-boarding tasks for the new Executive Director. This training can be 45 to 75 minutes depending on your needs. We provide handouts with job descriptions, recommendations on where to advertise/network, interview and reference questions, illegal interview questions, and an outline of an offer letter for the best candidate. Beginner Level.

NEW All About Main Street Boards

This day-long training of eight hours is called "All About Main Street Boards" and offered over the course of an afternoon and a morning. Our workshop starts with the board's role in governance related to the state's nonprofit law. We spend a large portion of the afternoon talking about building better boards by creating a yearlong nominating committee process to identify, vet, and prepare board members before nomination. We tackle questions like "Once nominated, what do board members actually do? When does the board act? How can I be a better board member?" We also focus on the officers, especially the board president's multifaceted role. The end of the workshop is devoted to "train the trainer," so managers can train their board members about how everyone can play a role in gathering friends and money for the downtown organization. There are plenty of handouts and options for small group discussions during this intensive level workshop. Intermediate level.

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 will not make the same mistakes! We will distribute a resource packet/links to 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 12 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. We provide links to the twelve handouts, which include 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 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 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 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.

Your New Board Policies Courtesy of the IRS

In 2015, the IRS completely redesigned their IRS 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 45-minute session, we will review the pertinent IRS 990 form questions and definitions. We will also provide sample policies and documents so that you understand the IRS concerns and can 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.

Getting Ready for 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 Strengths, Weaknesses, Opportunity, and Threat analysis (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 75 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.

Ten Tips for Main Street Boards to Improve Manager Retention

The 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 leaves 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 75-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 resource packet/links to materials including the slide deck, articles, and bibliography. Beginner level.

Weak Committees? Try Short Term 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 Approach. 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/links to materials including the slide deck, job descriptions, committee chair spread sheet, and bibliography. 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 on 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 links to online resources 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.

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 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.

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 will discuss job descriptions for volunteer activities. Next, we will focus on training techniques to ensure 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 cultivate 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/links to 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.

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 thumb drive with the presentation, templates, letters, and articles to use to develop your online volunteer recruitment effort. Intermediate level.

Communication, Social Media, and Advocacy

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 will 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 two-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.

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, recruit new volunteers, impress elected officials, and generally 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 at getting regional and national press about your successes. We will show you how to use national stories to illustrate local impact, pitch story ideas to regional/statewide business reporters, author op-ed articles, and know 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.

Making Your Reinvestment Statistics Memorable Using Written, Oral, and Visual Means

This half-day, hands-on workshop utilizes small teams to work on a series of fun exercises communicating common Main Street stats through written, oral, 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. 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 will 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 nextsteps 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 advocate and cultivate our elected officials at the local, county, state, and federal levels. Whether you are new to advocacy or an old hand, you will 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.

Get More National Press About Your Downtown

This 75-minute workshop is well suited for revitalization organizations that want to use their reinvestment statistics to their best advantage by offering themselves to the regional and statewide media for quotes about their downtowns. The workshop discusses the local angle and the implications of national news and trends. You will learn how to write an op-ed piece and a letter to the editor, as well as which national news sources to pitch your stories to. We will do one exercise, and you will return to the office with plenty of material to start you on the way to becoming more quotable in various media sources. Intermediate 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 every 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.

Promotion

Overview of Retail Events for Urban Commercial Corridors

Urban commercial corridors have different business mixes that tend to favor goods rather than dining destinations. This 60-minute workshop explains how urban commercial corridors can create retail events designed to ring cash registers 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

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 do not have them already. In this 90-minute workshop we will talk about when Design Guidelines make sense 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.

We provide consultations and preparation of Design Guidelines for downtown organizations.

Talking Trash: 25 Ways to Make It Disappear

We all know the truism: if downtown is not clean, then shoppers just will not 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, unswept 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 downtown: merchants, the public, and residents. For each group and the trash, they generate, we will discuss “carrot” strategies: design that encourages 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 them all to anyone who shares their email with us within a week of the session. 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 storefront 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.

Economic Restructuring

NEW Creating Revolving Funds to Save Threatened Historic Buildings Downtown

Revolving funds are an effective and old preservation tool. Today, there are about a hundred revolving funds across the country. These programs offer local preservation organizations a proactive means to intervene in the local real estate market to save threatened historic buildings. An Endangered Properties Program is an effort by a nonprofit historic preservation organization to acquire, stabilize and/or rehabilitate vacant or underutilized historic buildings and sell them to a preservation-minded buyer for rehabilitation with easement restrictions. An Endangered Properties Program essentially “buys time” for threatened buildings to find a new owner.

This 90-minute workshop discusses how a local downtown organization can work to create such a program at the local level. We have worked with two start up Revolving Funds--or as they are often called, Endangered Properties Programs, in two states, and can discuss how and why they approached this work. We will focus on the how of creating a local fund, who should be involved, and what kind of parameters should govern your organization’s intervention. We will provide a packet of links to sample documents, criteria, policies, and FAQ to explain the program to donors and supporters. Your organization will leave the workshop knowing whether your program is ready to start such an effort. Intermediate level.

We offer consultations about and feasibility studies for Revolving Funds. See the end of this document for further information.

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 creating strategies to address 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. You will learn how to create basic visitor amenities including effective websites and brochures for visitors and directional signage/banners. We will 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 is 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 beginning to think about business recruitment that need to gather materials together to give small businesses a compelling reason to open there. 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.

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. 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 will 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 visitors. 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 of 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/links to online data with lots of sample events and activities, as well as a bibliography. Beginner level.

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 will 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.

NEW All About Main Street Boards

This day long 8-hour training is called “All About Main Street Boards” and offered over the course of a morning and an afternoon. Our workshop starts with the board’s role in governance related to the state’s nonprofit law. A large portion of the workshop is talking about building better boards by creating a yearlong nominating committee process to identify, vet, and prepare board members before nomination. We tackle questions like “Once nominated, what do board members actually do? When does the board act? How can I be a better board member?” We also focus on the officers, especially the board president’s multifaceted role. The end of the workshop is devoted to “train the trainer,” so managers can train their board members about how everyone can play a role in gathering friends and money for the downtown organization. There are plenty of links to handouts and options for small group discussions during this intensive level workshop. Intermediate level.

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 through links to an online portal. 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 Main Street work plan’s component parts 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.

Organizational Consultations

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

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

Fundraising Consultations

Assessments of Fundraising Committee Work

Often these consultations occur to solve problems at the committee level. We gather materials in advance from staff about the current issue(s) facing the local Main Street program. We meet with the committee responsible and with staff to assess needs and offer innovative ideas and samples from other organizations to help improve the performance of the local program. We share links to sample documents 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 recruitment, retention, or recognition programs meet 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 its 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, annual gifts from these constituents 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 organizations.

Board Consultations

Organizational Assessments

Heritage Consulting has conducted organizational assessments throughout our career in Main Street revitalization. We visit with each board, executive committee, and staff member to identify the specific issue(s) they are struggling with now. We identify the issue(s) and offer our observations and recommendations to improve performance and results. 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, revise bylaws and policies, revise job descriptions, create board committee “charge” statements, and assist with new board or staff recruitment as needed.

Board and Officer Training

This consultation can be offered one-on-one or through small group discussion with current officers or individuals you want to train to increase your “bench” strength for future opportunities. We will spend time with board members that have not had the benefits of board training to explain their fiduciary and 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 the end of their term. All board members will receive a thumb drive with useful information including a job description, policies that are appropriate for that office, and a more thorough understanding of their unique and important role in the workings of the organization.

Board Retreats

We design half or full day board retreats to assist boards in understanding current conditions and reaching agreements on new directions and 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 to make the retreat memorable and useful. We compiled a brief written report following the retreat.

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 leaders or undertake individual interviews with board members and with key committee volunteers to identify likely prospects for board leadership in the future. All succession planning leaders will receive a thumb drive, with useful information pertaining to their specific situation.

Organizational Development and Transformation

Organization 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.

NEW! Search Process for New Executive Director

Heritage Consulting Inc. has been helping downtown organizations hire the best person available since we began our Main Street work 25 years ago. Today we offer one-on-one assistance over three to four months to create a new job description, create a search committee of board volunteers, advertise the job opportunity, sort resumes/packages, identify top candidates to interview, host interviews, create questions to answer, advise on reference checks, provide sample offer letters, offer suggestions for a welcome packet and receptions, and offer a list of tasks for the first 90 days on the job. This consultation can be a fixed fee or a monthly retainer.

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, 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 and 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 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. If an organization has less than \$50,000 in revenue for the first three years of existence, then we can prepare the IRS 1023EZ form. 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 should provide a considerable amount of advanced materials, including a GIS based map of all hotels, restaurants, shops, and recreational facilities within five miles of 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 to 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 have produced 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 will 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 local municipalities offer. We have set up two BIDs and worked with many others to understand what programs and services are best 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 preferred 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)

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. We use a small group process to assure that everyone is heard and that we collect all the intelligence from the participants 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 size.

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 second year of local revitalization programs, because the program needs to learn what is possible with volunteer help before it can begin to dream big. This consultation is best when selected community stakeholders participate (we will provide advice about whom to invite). While the local program handles the implementation of 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 written statement within a week of the workshop that describes what the downtown should be like in five years, given the magnificent work of the local Main Street program.

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 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 consultations provide advice for local Main Street organizations that are in the first or second year of their work. Organized by a state coordinating program, these consultations 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.

Economic Restructuring

Revolving Loan Funds/Endangered Properties Funds Consultations

We have worked with two citywide preservation organizations to help them intervene in the local real estate market to find new preservation-minded buyers for threatened historic properties in town. We researched and created a feasibility study for revolving loan funds to assist low and moderate-income historic homeowners with needed repairs to homes in targeted neighborhoods for the Columbus (OH) Landmarks Foundation. Their new fund matched a \$100,000 grant from the 1772 Foundation to begin a Home Preservation Loan Fund. They also created an Endangered Properties Fund which was already capitalized with \$200,000 from a bequest from a local benefactor to help the CLF intervene to protect historic commercial properties. The Endangered Properties Fund is now looking for projects to invest in, acquire, and sell to preservation-minded buyers. The Home Preservation Loan Program will be off to an aggressive start with its \$200,000 fund to provide small, low-interest loans to homeowners interested in preservation related repairs. For the Downtown Joplin (MO) Alliance, we completed a feasibility study to help the DJA to intervene in the real estate market to protect historic commercial properties. DJA went on to receive a \$100,000 matching grant from the 1772 Foundation to match and fully capitalize their fund. Our feasibility studies for both organizations were completed with our partner, A. Elizabeth Watson of Heritage Strategies LLC.

Consultation on Design Guidelines

Design Guidelines can be used for several purposes for downtown organizations: as baseline information to create incentive programs for storefront improvements, or as regulatory documents for historic preservation ordinances (especially for Certified Local Governments). We have created both kinds of Design Guidelines in the last five years and can help your Main Street organization create a set of richly illustrated guidelines to retain and enhance the historic character of downtown or residential historic district(s) in the community. We

visit the town to take photos of all the historic buildings in the district and ask that 20 historic photos be identified with addresses and captions to be included in the document. A local historian can provide a two or three-page history of the town to be included in the guidelines. We prefer to work with a small steering committee or the Design Committee as a whole when preparing these guidelines and creating a work plan to keep all on track. The steering committee reads and edits chapters to assure that they participate in and understand the implications of the chapters on storefronts, upper stories, entrances, ADA compliance, paint color (if regulated), signs, awnings, landscaping, and public amenities (flower baskets, flower beds, trees, bike racks, bus shelters, benches, trash cans, wayfinding, and directional signage) in the downtown. We work with a graphic designer to create page spread templates that we use to design the document. Depending on the size of the district, these projects can take between four and seven months to complete with monthly meetings and assignments for the steering committee.

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 gather opinions across a broad group of people about an issue. We work closely with the local manager to identify the questions we will 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's efforts. You will learn how to create a tour loop of committed organizations willing to work together to promote the area. 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 and 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 do not 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 creating downloadable guides and local walking tours, and adding other plaques, interpretive and directional signs, and tour maps to assure that visitors want to stop at other sites on the tour loop.

We will 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 Trip Advisor 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 thumb drive after the consultation, along with a brief report with our recommendations.

Please contact Donna to discuss your training or consultation needs by email:

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