



Heritage Consulting Inc.

Downtown Revitalization Workshops and Consultations

Update 8-2017

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 14 years, we have consulted with organizations and government agencies on the many ways to make downtown organizations more effective.

Our workshops and training programs are presented below, organized by topic. We note whether they 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. 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 175 downtown organizations nationwide in the last 20 years, has given us a breadth of experience. We've consulted with organizations are just starting out, working to advance their agenda, and 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 are specifically for them.

Our workshops and consultations are excellent for statewide or regional conferences, group trainings, or local downtown management organizations. Our workshops are hands-on, engaging and fun. We include interactive learning experiences during each workshop, share stories from our experiences, and immediately 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 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 training workshops first, then our consultations in the list below.

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 they delegate 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 different 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.

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 PowerPoint, articles, calendar, and bibliography. Advanced level.

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

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the country and the lessons they have taught us. We will share a *Main Street News* a feature article called "Is a BID Feasible in Your Town: Ten Questions to Ponder," other articles and materials of interest so you can avoid BID failure in your town. Intermediate/Advanced level.

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 need 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 PowerPoint, our *Main Street Now* article, checklists, state legislation, budget templates, and bibliography on CD. Intermediate level.

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

I Hate Fundraising! Removing Anxiety & Boosting Board Participation

This 90-minute course will help you respond to the age-old statement "I'll do anything, but just don't ask me to fundraise!" We will show you how even the most reluctant board (or committee) member can participate in the many tasks toward raising the necessary funds to operate your local Main Street organization. We will conduct a mock 20-minute training session that you can replicate in your own organization, about many tasks needed to raise funds. The trick is showing board members that fundraising is not only about making the ASK. Everyone can do his or her small part. In addition, by asking Board and committee members to undertake tasks they will carry out, you will get greater participation (and less anxiety) from all involved. Based on the work of Hildy Gottlieb (<http://www.hildygottlieb.com>) 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.

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

Surviving a Financial Crisis: Strategies that Work

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

Creating a Fundraising Plan

As downtown programs mature, 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 PowerPoint presentation, several articles, templates, sample fundraising calendar, and bibliography on CD. Intermediate level.

Member Power: More Members, More Revenue

Over the years, MainStreet Libertyville (IL), a 1997 GAMSA winner, 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.

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.

Year-Long Sponsorship Packages

Learn why you should gather all of your sponsorship opportunities into one package to solicit

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sponsors on a yearly basis, rather than one 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 for which most are completely unprepared. Raising big money for capital projects is 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—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 for your project. We will supply a CD of information including articles, lists, and a bibliography. Advanced level.

The Ask: Getting Your Board Comfortable with Fundraising

Mounting a capital campaign to raise large sums to save or restore an historic building in town is hard work over many years for any Main Street organization. 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.

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.

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

Unlike other nonprofit boards where governance is their primary job, Main Street Boards are both working and governing entities. This duality may result in mixed messages or lax oversight on the board's fiduciary duties of care, loyalty and obedience to the law. In this 90- minute workshop we will train Main Street Managers to provide some basic background about these vital nonprofit fiduciary duties, and how to convey these concepts to your board. We will supply a brief PowerPoint 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 their implication for day-to-day work on Main Street. We will all do the quiz at the end of the workshop and discuss the correct responses so that you feel confident when you answer questions from your Board. Intermediate level.

Better Recruitment = Better Boards

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

Your New Board Policies Courtesy of the IRS

Recently 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 to 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.

What's up with Business Associations?

An extensive study undertaken in 2013 by the Delaware Valley Regional Planning Commission of the 71 suburban commercial districts in its nine-county region, they found that fully 88% of these downtown districts were unstaffed and managed by business or merchant associations— including some of the most highly successful downtowns in the greater Philadelphia region.

This 60-minute workshop will talk about how these businesses associations actually work. We will talk about the motivations of merchants to form these independent entities, the mechanics of keeping records and charging dues, running events, and typical activities these volunteer groups undertake for their downtown districts. We'll talk about taking formal steps of incorporating, writing bylaws and applying for tax-exempt status too. This workshop will be helpful for downtowns interested in using the Main Street Approach™ but unable to gather enough funding or support of local government to hire a downtown manager in the foreseeable future. This workshop will help you identify key players who can provide leadership for this effort. Beginner level.

How Board Members Can Retain Talented Executive Directors

Main Street Executive Director turnover is real and expensive for downtown organizations with limited funds. The “revolving door” thwarts downtown progress, and high turnover reflects poorly on your organization. We will discuss the five general reasons that Main Street managers leave their jobs, but our focus will instead be on the positive side: how Main Street Boards can retain talented Executive Directors by aggressively addressing root causes of dissatisfaction.

This crash course, geared mainly for Board members, discusses 10 actions that Main Street Boards can undertake to fundamentally slow down or stop the “revolving door” and create a healthier work/life balance for Main Street Executive Directors. We will talk about regular, quality communication between the Board President and the ED, evaluations, raises, part time staff, taking tasks away from the Executive Director, creating bonus pools, as well as encouraging vacations, conference presentations, and flex time to lessen the stress and enhance retention. Board members will leave with a list of actionable tasks that they can use tomorrow to make sure their talented Executive Director is happy and poised to stay for the long term. Beginner level.

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, 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.

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 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 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 PowerPoint, 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 to engage more people in your organization's work. Learn how the role and activities of the Committee chair must evolve to permit these new relationships to thrive. See why work plans are still critical to the success of these arrangements and how to create reliable reporting relationships. We will supply sample Committee chair spreadsheets to chart task force/individual project work, 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 PowerPoint, job descriptions, committee chair spread sheet, and bibliography. Intermediate level.

Volunteers

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'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 program. 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.

21st Century Volunteer Recruitment

There are so many ways to recruit both live and virtual volunteers to help with your downtown work. In this 75-minute workshop you will learn about some new tools for recruitment, and why job or task descriptions are still critical to attract skilled volunteers to the cause. We will do two short exercises about how to recruit live as well as virtual volunteers. This workshop includes a CD with the presentation, templates, letters, and articles to use to develop your on-line volunteer recruitment effort. 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.

Public Relations, Social Media and Advocacy

Your PR Plan

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

Overview of New and Traditional Media for Downtown Organizations

This is a review of the many types of public relations and advertising that Main Street organizations do in the course of a year. We will discuss the use of the hottest new tools for communicating about downtown including Facebook group pages, Twitter accounts, 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 radio, TV, and 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.

An Ideal Main Street Web Site

We designed this workshop for downtown organizations that already have a web site, but believe improvements are necessary to communicate to residents and visitors. In our consulting, we have seen hundreds of local web sites and have screen shots from organizations, large and small. This workshop also stresses organizational transparency as a result of new requirements from the IRS 990 informational tax return requirements. We will discuss what kinds of content you should have on your web site to meet these requirements. This 75-minute workshop is not a primer in HTML or Content Management systems. Rather it an explanation of the content, pages, and navigation that are important for visitors and residents. At the end of the workshop you will be able to visit with your web designer to create a more effective site. Beginner level.

Effective Public Relations for Downtown Organizations

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

bibliography, and relevant articles. Beginner 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, attract new volunteers, impress elected officials and generally use your stats to make you, and your program, more famous. We will use a group exercise to discuss easy ways to find 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, write op-ed articles, and when to send letters to the editor. We will also talk about how to automate some of your PR tasks so you can create a schedule to promote your town with 52 weeks of good news. We will sum up by showing some great examples of how to use stats in your annual reports, annual meetings, volunteer recruitment, and business recruitment packages. Intermediate level.

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

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 can have 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 next steps for you to use your impressive stats to 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.

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 best advantage by offering themselves to the regional and statewide

media for quotes about their downtowns to discuss the local angle and implications of national news and trends. You will learn how to write an Op-Ed piece, letter to the editor, and some national sources to pitch your story ideas to reporters. We'll do one exercise and you will return to the office with plenty of materials 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 some kind of crisis in the last six months—funding not coming through as expected, a board member resigns, staff decides to leave, a downtown fire, or other more genuine issue. Organizations need to know what to do in advance of a crisis to minimize the damage to your brand. This 90-minute workshop will help you identify some of the top vulnerabilities of your organization, give you tools to create press releases and talking points, a template for an emergency contact list and other parts of the 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.

Promotion

Overview of Retail Events for 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.

Event Life Cycles: The Power of Analysis

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

Design

Design Guideline Basics

This workshop provides an overview of the component parts of good quality Design Guidelines and how your Design Committee can develop a basic set of guidelines for your program if you don't have them already. In this 90-minute workshop we will talk about when design guidelines make sense for

the downtown, how to work with existing historic building inventories including National Register Nominations, or state survey forms to learn about the existing architecture of your downtown. We will talk about the regulatory framework for your guidelines and how to involve city planning and historic commission staff in your work. We will supply samples of design guidelines that we admire, and provide an organizing template for you to develop your own sample when you get home. Intermediate level.

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 also 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: designed encourage compliance and incentives for better behavior. We will also talk about "stick" strategies, including defensive design, enforcement of existing ordinances, 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.

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 of 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 maintenance of historic buildings. Beginner level.

Creating Carrots for Preservation in Your Town

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

Curating an Authentic Downtown Experience

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

Recreation as co-presenter. Intermediate level.

Economic Restructuring

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, and 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, 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 customizable to be a 75 or 90-minute session. 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 and needing to gather materials together to create a compelling reason why a small business would locate to your town. We will demonstrate creation of a simple business cluster chart to identify existing market niches; how to use the US Census materials to share your towns 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. Beginner level.

Main Street Basic Training

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

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

This training on the role and activities of the Design Committee discusses why downtowns declined and 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 on the Design Committee. Beginner level.

Basic Training: Promotion Committee

The Promotion Committee helps bring people back downtown as a shopping and social environment for residents and shoppers from outside the community. We will discuss the role of this key committee and why it is often called the “fun” committee of Main Street. We will discuss typical projects and events that the Promotion Committee members undertake, the types of people that should be recruited to serve, and how to grow the capacity of the Committee members to take on more sophisticated projects over time. You will 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.

Advanced Basic Training: Organization Committee

This 3.5-hour workshop is well suited for those involved in Main Street 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.

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 capacity of the Committee members to take on more sophisticated projects over time. You will learn how this committee assists the board with fundraising; recruits, retains, and rewards volunteers and presents

the program to the public by using traditional and new media. A resource packet will be distributed with blank forms, letters, articles, a bibliography, and other goodies to make your Organization Committee great! Beginner level.

Committee Training: Design 101

The Design Committee focuses on the visual impact of the downtown: how clean, safe and attractive it is for shoppers and residents. Learn about the role of this key committee during this fast paced 90-minute session. We will discuss typical projects that Design Committee volunteer members undertake, the types of people that you should recruit to serve, and how to grow the capacity of the committee members to take on more sophisticated projects over time. You will learn how this committee helps to educate the community about good design, puts 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 as a shopping and social environment for residents and shoppers from outside the community. We will discuss the role of this key committee and why it is often called the “fun” committee of Main Street. We will discuss typical projects and events that the Promotion Committee members undertake, the types of people that you should recruit to serve, and how to grow the capacity of the committee members to take on more sophisticated projects over time. You will come away with a good understanding about the difference between a special event, a retail event and an image activity so that you can begin to develop these key activities right away. A resource packet includes a bibliography, articles, and other materials useful for the Promotion Committee. Beginner level.

Creating a Vision Statement

Visioning is a process to identify the preferred future for your revitalization organization. Creating a vision statement does not happen during the first or second year of local revitalization programs because the program needs to learn what is possible with volunteer help before they can begin to dream large dreams. This workshop is best when selected community stakeholders are invited to participate (we will provide advice about whom to ask). While the local program 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— 10 years from now. From there, the groups make reports and then go back into small groups. This exercise 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 10 years given the great work of the local Main Street program. Beginner level.

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

Creating a Mission Statement

Most revitalization programs develop a generic mission statement to satisfy their organizational documents—bylaws and incorporation papers—and then forget about this seminal statement about why the organization exists, whom it serves and how it goes about its work. Our workshop helps to take an old mission statement and give it life based on the current work of the organization. This workshop 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. Beginner level.

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

Hosting an Effective Meeting

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

Main Street Manager Training

New Main Street managers need to know their role relative to the Board of Directors, since they are the managers, not the leaders of the organization. This fast-paced session discusses the subtle difference between being a manager that gets volunteers to undertake the work of the organization, and doing the work 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 central role of the work plan in any downtown effort. This 60-minute workshop describes the component parts of the Main Street work plan, its key role in budgeting, volunteer recruitment, scheduling and evaluating committee work for the Board, staff and volunteers. We end with a hands-on group exercise to create a work plan for a project selected by each group. Beginner level.

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

Organizational Consultations

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

1. Fundraising
2. Board Issues
3. Organizational Development and Transformations
4. Audience Research

Fundraising Consultations

Assessments of Committee Work

Often these consultations occur to solve problems at the committee level. We gather materials in advance from staff about the current issue facing the local Main Street program. We meet with the committee responsible and with staff to assess needs and offer new ideas and samples from other organizations to help improve the performance of the local program. We share 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 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 organizations.

Board Consultations

Board Retreats

We design half or full day visits to assist boards in understanding current conditions and reaching agreement on new directions or long-term goals. Advance work by the Board is necessary to organize a useful retreat. Heritage Consulting works closely with staff to craft an event that includes exercises or other small group projects during the event to make the retreat memorable and useful. 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.

Organizational Development and Transformations

Bylaw Review and Update

Heritage Consulting Inc. has written bylaws for countless Main Street organizations and trained board and staff about their importance. More recently, we have helped mature organizations to review and refashion their bylaws to 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 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; and fires, floods or other natural disasters. We visit the community and help them to sort through the problem, and identify next steps.

Mission and Vision Statement Development or Review of Existing

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. Also, 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 IRS form 1023 for submission to gain the 501(c) (3) charitable

status. We have also coached local Main Street organizations that are starting new or wish to change their charity designation from 501(c)(6) to the more preferable 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 a base map for our on-site work. We include as a deliverable a report on the results of the assessment with recommendations.

Personnel Evaluations or 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 time 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 the assessment is a one-day visit to a local Main Street program to assess current needs or intervene in a controversy. In some cases, the organization decides to change from one organizational form to another to achieve its objectives. We have helped organizations move from a community development organization to a local Main Street organization. In another case, we recommended the formation of a business improvement district as 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 a number of 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. A good quality document involves surveys, interviews, SWOT analysis, and small group exercises in advance of writing the plan itself. Ideally a Strategic Plan should include all of these elements and may take several visits and up to six months to complete. We can devise more compressed versions if budgets are limited. A written report results.

SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats)

Whether used as part of a Strategic Planning exercise or for taking the temperature of community residents, SWOT is a feedback mechanism that can help you get information from your stakeholders FAST. SWOT 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 SWOT to help you make decisions. Following the SWOT, we produce a report in the form of a memo with observations and recommendations. We also include the sorted notes from the SWOT 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 stand-alone activity for a downtown organization. These 25 question surveys help identify what shoppers want downtown, what events are working, where shoppers get their news, demographic questions and 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.

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 board meeting. We provide feedback about current work of the board and committees and to confer with the local manager, mayor, and other city officials. A written report concludes the visit.

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

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.

Audience Research

Audience Research

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

Please contact us to discuss your training or consultation needs donna@heritageconsultinginc.com