



Main Street Four Point Approach

Board Training and Strategic Planning Session

Payson, Arizona

January 18, 2002

**Presented by
Burnes Consulting**

Introduction

On January 18, 2002 the Payson Main Street Program conducted an orientation to the Main Street Program and a strategic planning session. The purpose of this work session was two fold: (1) to educate Main Street board members, community partners and elected officials about what Main Street is and how the process works; and (2) to start the strategic planning process for the organization that will result in their ability to complete work-plans and move forward towards implementation.

Kent J. Burnes, Principal of Burnes Consulting located in Grass Valley, CA facilitated the training. The Arizona State Main Street Program funded the training and planning session as part of their technical assistance services they provide to the rural Main Street communities including the community of Payson.

The meeting began with participants giving a short introduction of themselves and the position they held in the either the community and/or the organization. Consultant then lead the participants through an overview of the history of the Main Four Point Approach, the four points or areas of concentration and the eight guiding principals that the Approach advocates. Consultant then explained the roles and responsibilities of the Board, staff and committees. The information presented at the training can be found in the Board Manual that has been compiled by Burnes Consulting and will be given to the community to be used as a reference.

S.W.O.T.

After the overview of the Four Point Approach and the roles and responsibilities of the Board, staff and committees, consultant moved into the strategic planning process. Consultant asked participants to respond to the question of what were some of the strengths, weakness, opportunities and threats that they felt faced both the downtown district as well as the Main Street organization. Below is the recap of the responses:

Strengths

Program

- Leadership
- Project manager
- Supportive public partner
- Committees
- Office
- Interest
- State and National assistance
- Talent
- Creativity
- Resources and knowledge
- Funding

Area

- Public infrastructure
- Sense of history
- Green Valley lakes
- Sawmill crossing
- Historic structures
- Easy access
- Available land
- Empty buildings
- Incentives
- Public control of land
- Zoning

Weaknesses

Program

- Apathy
- Lack of volunteers
- New/Lack of credibility
- Invisible in community
- Funding inadequate
- Education
- Communication
- Risk of failure
- Fear
- Lack of long-term commitment
- Lack of long-term plan
- Negative public opinion
- Lack of private funding

Area

- Blighted
- Vacancies
- Public perception
- Zoning issues
- Industrial property
- Public infrastructure
- Flood plain
- Lack of retail, restaurants
- Visibility
- Lack of Tax Increment Financing
- Lack of consistency
- Fragmented ownership
- Super – Fund sight
- Local opposition

Opportunities

Program

- Increase funding
- Partners
- Work-plans
- Involve community
- Institutionalize program

Area

- Traffic
- Increase business, nightlife, restaurants, and entertainment
- Solve flood problem
- Youth involvement
- Outside development/interest
- Reduce traffic congestion on 87
- Brand the area and the program
- Increase sales tax dollars
- Zoning improvement

Threats

Program

- Lack of vision
- Fear
- Lack of funding
- Poor leadership
- Alienation
- No buy in
- Opposition/vocal minority
- Lack of education
- Property owners/business owners apathetic or threatened

Area

- Lack of enforcement
- Flood plain
- Vacancies
- Competition
- Heavy opposition
- No balance of service businesses versus diverse retail
- Economic conditions in the country
- Lack of government commitment
- Zoning

Goals

Consultants then asked if the community had a vision for downtown and if the Main Street Program had developed a Mission statement for the organization. After some discussion, participants were not sure if there was an actual written Vision statement for downtown. As a result consultants asked the participants to think about some key words that would describe what they envisioned downtown becoming. Below are their responses:

- Interesting
- Attractive
- Exciting
- Historic
- Inviting
- Productive
- Artistic
- Cultural
- Entertainment area
- Businesses
- Diverse
- Specialty shops
- Clean and well maintained
- Safe
- Friendly
- Cobblestone sidewalks
- Vibrant
- Variety
- Family orientated
- Quaint
- Honest
- Connected geographically to Green Valley
- Reflects the community through history, values, and heritage
- Destination for “ outdoor experience”
- Memorable
- Attract return visitors
- Homey
- Downtown becomes a destination
- Program needs to have an influence on surrounding areas
- Area to include a government and community center

Consultant then suggested that the Board take some time and draft a written Vision Statement that incorporates some of the descriptive words expressed at the training. Consultant would also recommend that the Board review the organization’s Mission Statement to see is still relevant and supports the Vision of downtown.

Next, the consultant explained that the Main Street Approach is a program that focuses on implementation of projects in four distinct areas (the four points); Organization, Promotion, Design and Economic Restructuring. A Main Street Program must first identify goals that will be used to guide the organization's annual program of work. The goal setting process allows each committee to then develop specific projects designed to accomplish the stated goal(s), develop the tasks required to complete the project thus completing the committee's program of work. The work-plans from each committee are then combined to serve as the program's annual program of work. Without this annual program of work, committee chairs, volunteers, paid staff, donors and partners are unsure of the purpose of the organization or how they fit in to the process. Without a program of work there is difficulty-benchmarking success to share with the community and partners.

Consultant briefly described that one of the approaches now being used by many downtown management organizations in the development of their program of work is to have the Board establish four or five very general goals that relate to the entire program versus thinking of the function of each committee and then developing a goal for that function. These goals are formulated based on the information extracted from the identified strengths, weaknesses, and opportunities or threats (SWOT) of the organization and the district. The goals should identify strengths that will minimize the weaknesses while taking advantage of the opportunities to stave off the threats. In addition to being broad-based, consultant explained how each goal becomes strategic by defining the reason or purpose for that goal for that particular year. For example, a broad based goal would read as "Improve the overall image of the district." A more strategic goal might read as "Improve the overall image of the district ***to attract more local shopping to the area or to attract more tourist or to strengthen the economic base of the business district.***"

Drawing on the information from the SWOT exercise, participants identified the following broad based goals for the program that should be used to identify projects for each committee for the upcoming year.

- Educate the community via communication to inform, influence, increase support, create credibility, and display the benefits of the “Main Street Four Point Approach” to the community and visitors.
- Improve the image to instill pride and create an environment for investment.
- Secure stable funding bases so that Main Street will continue operations.
- Cultivate volunteer and partnership networks to institutionalize the program and implement projects both publicly and privately.

Consultant explained that after the Board sets and adopts the goals then the committees should actually develop the activities in which to accomplish the goal; that is the function of the committees. However, the Board can recommend suggested activities they would like the committees to consider. At this point in the training, consultant asked the participants to brainstorm some examples of the projects that they thought the committee should address and/or ones that the committee has already began and should be continued. On the following page are the ideas and projects that were suggested at the training. These are the identified projects that a downtown organization should be focusing on in their first and second year as Main Street program. Consultant would recommend that the Board have each committee prioritize the activities before they begin developing work plans. There are a number of activities for the committees to consider and with limited resources (both financial and people power) committees should review the projects and determine if they are short, quick success type of activities or is the activity a long term project. This will help with the work plan process as well as ensure that volunteers stay motivated.

*Payson Main Street
Board Training and Strategic Planning Session*

ORGANIZATION	DESIGN	PROMOTION	ECONOMIC RESTRUCTURING
<p>Create a newsletter</p> <p>Develop presentation to educate community about the Main Street Four Point Approach*</p> <p>Develop a membership program*</p> <p>Start a monthly newspaper column</p> <p>Develop a regular radio education program</p> <p>Create volunteer recognition program</p> <p>Organize network between all four committees</p> <p>*See attached example of work plan for this project</p>	<p>Create historical research committee within design committee</p> <p>Research and create main street design guidelines for facades, buildings, and exterior environments</p> <p>Create and implement a historical and educational walking tour</p> <p>Put up a sign identifying one is entering a “ Main Street Zone”</p> <p>Develop renderings and blue lines in with “wishes”</p> <p>Develop a presentation for property owners and businesses regarding sensitive historic design</p> <p>Create a streetscape master plan</p> <p>Develop an incentive program for historical and accurate preservation</p> <p>Host a Spring Clean Fling</p>	<p>Evaluate existing promotion calendars for entire community*</p> <p>Make downtown area a “Stage” by offering it to other partners as a place for different functions</p> <p>Advertise program via button campaign and media releases</p> <p>Create a “Historic Sidewalk Sale”</p> <p>Find volunteers to hand out literature regarding the area and its history along with the program philosophy (work with design committee)</p> <p>Create a competition and awards program for exemplary businesses and property owners. Coordinate with the Design committee for guidelines</p> <p>Access funding from developers who may benefit from the program</p>	<p>Develop a “one-stop shop” for business and property owner information regarding education, funding, recruitment, etc.</p> <p>Do a market analysis</p> <p>Integrate public and private funding resources</p> <p>Lobby for Tax Increment Funding</p> <p>Develop a plan for providing on going business education for business owners*</p> <p>Contact property and business owners and engage in informational discussions</p> <p>*(See attached example of work plan for this project)</p>

The projects outlined in the above grid will serve as ideas and a guide for each committee to follow when developing their work-plans. It is important to remember that these projects are suggestions only and final projects with tasks assigned should take place in the committee.

Consultant suggested that, in addition to the normal functions, the Board should focus on the following activities to assist with maintaining and growing a strong organization.

- Secure funding for Main Street.
- Review and set policies and procedures for operations.
- Recruit volunteers to the program.
- Review and make adjustments to vision and mission statement.
- Assist committees with work-plan development.
- Separate identity from Redevelopment Agency.

Consultant' Observations and Recommendations

Too often Boards and staff dismiss planning as an empty exercise that bears little relevance to the day-to-day challenges of non-profit management. Caught up in the chaos of resolving the latest crisis or responding to most recent demand, both staff and Boards may lose sight of their original goals and objectives.

Organizational planning ensures that clear priorities are established, activities are focused and that accomplishments are measurable. For many organizations, this disciplined approach can determine the difference between success and failure.

The purpose of the Board training and strategic planning session is to build on the work that the Payson Main Street program has started. In turn, this document is intended to supplement those organizational planning and development activities that were presented at the Planning Session with observations and recommendations for the future. It is intended to support and facilitate ongoing planning work by the Payson Main Street program and the community at large. Ultimately, the success of any planning effort depends upon the commitment of an organization's Board, staff and stakeholders to translate the stated mission, goals and objectives into disciplined organizational actions.

To build on the momentum developed at the planning session, start developing a comprehensive program of work and assist with recruiting and motivating volunteers, consultant would recommend the following steps for the Payson Main Street program:

- Boards of Directors should review the goals and projects as developed at the planning session, make any changes as needed and then officially adopt them.
- The Board, with assistance from Staff should begin to “staff” committees by appointing chairs for each committee and finding members to serve on the committees.
- Have committees review the list of suggested activities and begin to prioritize them according to short and long term. Have committees start to develop work plans for all of the projects and activities they prioritize. As with most volunteer driven organizations, how to recruit, retain and motivate individuals is a question that always comes up. To address this on-going challenge, the development of comprehensive work plans has proven to be one of the most valuable tools for attracting and keeping volunteers. In general, the work plan should reflect the program’s biggest priorities and be realistic in its scope. Remember that it is impossible for the Main Street program to be everything to everyone; to be effective its efforts must be focused. Do not force activities that do not fit the program’s purpose. Do not attempt projects for the wrong reasons; i.e. because a grant is available to conduct the project, because the activity will put someone on the payroll, because the project will generate publicity or because no one else will do the project. Scrutinize every proposed activity and be sure it makes sense for the program. It is okay to say “no” or put suggestions on a list for future action. On the other hand, do not be so rigid that you turn down good opportunities when they come along, but be sure any changes in the program’s agenda are made for very sound reasons.
- Have each committee present their work plans to the Board who should then review them and either adopt the work plan or recommend changes for the committees to discuss.

- Once the Board has adopted the work plans then an annual program of work is created. This program of work should be presented to the membership, City partners and other supporting organizations through such venues as the newsletter, public presentations, brochures and etc.

Below are several projects that were suggested at the training. Consultant have “tasked” out several of them to be used as a template for the committees as they develop their own work plans.

Organization Committee

- **Develop a presentation about Downtown Payson and the Main Street Program.**

The Organization Committee, along with the Board and Manager, should develop the presentation or “dog and pony” show about the Main Street program, its accomplishments and goals for the future. The show should also include a history on the Four Point Approach and why it was developed, the vision and mission of Payson Main Street and how organizations and/or individuals get involved. Before and after slides of the project area along with statistical information should be part of the program. The objective of the show is to assist with educating the community about the Main Street program as well as ask for both membership and involvement. It is recommended that backup material, such as the organization’s newsletter, program of work and/or membership brochure, is made available the end of the show. This outreach education is imperative on a continuing basis to keep stakeholders informed and maintain interest in the Main Street program. The presentation should be shown to anyone who has a vested interest in the future of downtown Payson, including property and business owners throughout the district and the community, city council and staff, residents (both permanent and seasonal) chamber of commerce, economic development organizations, civic organizations and etc.

- **Develop and Implement a Membership Campaign**

The Organization Committee, with help from the Board of Directors and staff, should develop and implement a membership drive. It is important to stress that going out and “selling” memberships should not be expected of or is it the job of the Manager. Typically it is the responsibility of the Organization Committee to develop a plan for the membership drive and, with the help of the Board, also “sell” the memberships. Staff can supply the information and provide input on the plan but they should not be going “door-to-door” and asking for memberships. Many business owners perceive this as the Manager trying to raise her own salary or attempting to create job security that weakens the effectiveness of having the Manager seen as a valuable resource and liaison between the program and the business community.

The first step that is recommended in developing any fund-raising plan is to establish a budget which outlines the amount of revenue the organization intends on raising as well as the expenses to develop and implement the drive. The next step in developing a plan for the membership drive is for the Organization Committee to spend time reviewing what might be some of the direct benefits of joining Main Street, design the various levels of membership related to the benefits received and then create some type of marketing piece to be used to help “sell” the memberships. The marketing piece (i.e. brochure) not only needs to explain the levels and benefits of membership but should also provide an overview of the Main Street program, accomplishments to date of the program (including statistical information), the Vision, Mission and goals of the organization, the upcoming program of work and how to get involved. The piece could also include testimonials from businesses, names of the Board of Directors and other support items. All marketing pieces need to be very professional looking yet simple enough that it does not overwhelm the prospective members. The Organization Committee should contact other Main Street programs across the Nation for examples of how they have structured their membership levels, what type of benefits do they offer, the types of drives they have implemented and any marketing pieces to support the drive.

The work plan for the membership drive should also include how will the “drive” take place, what the committee will assist with and what they need the Board to help with. For example, the Organization Committee might ask the Board to provide a list of potential names to contact. After the individuals are contacted through the methods outlined in the “drive”, the committee or staff does a follow up call to measure interest. The committee may then go back to the Board and ask them to contact individuals for the final "sell". In addition, consultants suggest that the Committee incorporate in the work plan, ideas on how the “supporters of downtown” will be recognized throughout the year and think about retention for next year.

Promotion Committee

- **Develop a Comprehensive Calendar of Events**

A comprehensive calendar of events should be developed to assist business owners with making advertising decisions as well as informing customers and residents of special events and promotions in the district. One of the advantages of developing a calendar of events is that the Promotions Committee begins to develop a better idea of who is doing what within the community. As a result, the committee can then make decisions on whether a new event is needed to fill a gap, if the Main Street program can “piggy back” on existing community based event and/or should the program encourage an event to come “downtown”. In addition, the Promotion Committee should evaluate the calendar to ensure that there is a good balance of commerce building events or promotions and add to the calendar if needed. Main Street and downtown programs across the nation have developed great commerce building promotions over the last decade and consultant would encourage the Promotion Committee to research what new and interesting one have been developed.

Economic Restructuring Committee

- **Develop a Business Education Program**

It was suggested at the training that the Economic Restructuring Committee consider developing a business education program to assist with strengthening the businesses located in downtown. Consultant has added a few other ideas to assist with providing a comprehensive education program for the downtown businesses. Committee might want to review these suggestions to see if they are viable and doable.

- Workshops/Seminar Series
 - 1) Inventory information on all workshops/seminars that are currently being offered in the community
 - 2) Develop a method of publicizing opportunities
 - 3) Determine if there are any gaps in the workshops offered
 - 4) Develop a new program or workshop to meet that need if necessary
- Other suggestions:
 - Have speakers at the General Membership meetings (Davis Downtown Business Association in Davis, California has been very success with having speakers at their General Membership meetings)
 - Provide four educational based articles for the newsletter
 - Develop a resource library for members
- **Strengthen Relationships with Property Owners**
 - Get better representation of property owners on the Committee
 - Conduct one-on-one visits with Property Owners
 - Host a Property Owner Breakfast
 - Newsletter
 - Put property owners on the newsletter mailing list
 - Provide a quarterly article in the newsletter specific to property owners