



AGENDA

**Charlevoix Downtown Development Authority and Main Street
Board of Directors**

**June 26, 2017 5:30pm
City Hall Council Chambers**

- 1. Call to Order**
- 2. Pledge of Allegiance**
- 3. Roll Call**
- 4. Inquiry into Potential Conflicts of Interest**
- 5. Consent Agenda**

All items listed under Consent Agenda are considered routine and will be enacted by one motion. There will be no separate discussion of these items. If discussion of an item is required, it will be removed from the Consent Agenda and considered separately.

- a. Minutes of the May 22, 2017 Regular Board Meeting
- b. Minutes of the June 12, 2017 DDA Work Session
- c. Committee Meeting Minutes
- d. Main Street Monthly Report for May 2017
- e. Revised DDA Meeting Calendar

6. Reports

- a. Director's Report
- b. Branding Update
- c. Live, Life, Local Campaign Update
- d. Application Based Service Update

7. Old Business

None

8. New Business

- a. Draft Chamber/Main Street DDA contract for services (2017-18)
- b. Façade Grant Application – Townhouse Bar
- c. Façade Grant Application – 52 Weekends
- d. Adoption of Charlevoix Main Street DDA Overarching Goals for 2017-18

9. Public Comment

10. Request for Future Agenda Items

11. Board Comments

12. Adjourn

The City of Charlevoix will provide necessary reasonable auxiliary aids and services, such as signers for the hearing impaired and audio tapes of printed materials being considered at the meeting, to individuals with disabilities at the meeting upon one weeks' notice to the City of Charlevoix. Individuals with disabilities requiring auxiliary aids or services should contact the City of Charlevoix Clerk's Office in writing or calling the following: City Clerk, 210 State Street, Charlevoix, MI 49720 (231) 547-3250.

Posted: June 23, 2017 10:00 AM

CHARLEVOIX MAIN STREET MISSION

The mission of the Charlevoix Main Street program is to strengthen the year-round economic vitality of our vibrant historic business district through community efforts, events, and public/private partnerships while fostering a sense of community pride and ownership.

CITY OF CHARLEVOIX
CHARLEVOIX DOWNTOWN DEVELOPMENT AUTHORITY/MAIN STREET BOARD MINUTES
Monday, May 22, 2017 at 5:30 p.m.
210 State Street, Charlevoix, Michigan

1. Call to Order

2. Pledge of Allegiance

3. Roll Call

Chair: Kirby Dipert
Members Present: Richard Christner, Tami Gillespie, Luther Kurtz, Maureen Owens, Rick Wertz
Members Absent: Fred DiMartino, John Yaroch
City Staff: Mark Heydlauff, City Manager; Lindsey Dotson, Executive Director

4. Inquiry into Potential Conflicts of Interest
None.

5. Consent Agenda

- a. Minutes of the April 24, 2017 Regular Board Meeting (No Quorum)
- b. Minutes of the May 4, 2017 Regular Board Meeting
- c. Committee Meeting Minutes
- d. Main Street Monthly Report for April 2017

Motion by Member Wertz, second by Member Owens, to approve the Consent Agenda as presented. Motion passed by unanimous voice vote.

6. Reports

a. Director's Report

Director Dotson stated that Cherry Republic came to an agreement with The Lake House to sell 40 of their products this season and also The Lake House will be featuring Fustini's products now.

Director Dotson stated that the Charlevoix County Community Foundation awarded the Junior Main Street Program a \$1,000 Sun grant for their app. She stated that the students would be offering one-hour training sessions on how to use the app and there will also be a formal training opportunity with the Mobile Town Guide company in the future.

7. Old Business

a. a5, Inc. Branding Concept Refinements

Director Dotson proceeded to go through the presentation describing the two platforms, current mixed bag of digital identities, and concepts A, B1, B2, B3 & B4 and how they could be used. Discussion followed regarding the font style, the package of templates and deliverables that were a part of this branding process, and the scripts, images and platform. Amanda Wilkin stated that most members of their Committee selected B2 as the best option and explained the reasons for their selection.

Motion by Member Wertz, second by Member Gillespie, to go with Concept B (the big "C"). Motion passed by unanimous voice vote.

Motion by Mayor Kurtz, second by Member Owens, to eliminate B3 and B1. Motion passed by unanimous voice vote.

Motion by Member Wertz, second by Member Owens, to recommend B4. Discussion followed regarding the various options and logos. Motion failed by a 2 to 4 vote with Owens and Wertz voting Aye and Christner, Dipert, Gillespie and Kurtz voting Nay.

Motion by Member Wertz, second by Member Christner, to recommend the B2 logo to the City Council. Motion passed by a 5 to 1 vote with Owens voting Nay.

Motion by Member Owens, second by Member Wertz, to select "Beautiful" as the brand platform. Motion passed by unanimous voice vote.

8. New Business

a. Main Street Refresh Strategy Adoption

Director Dotson recalled that both the Michigan and the National Main Street Associations visited Charlevoix after they conducted research and a community survey. Discussion followed regarding the proposed Health & Wellness or Healthy Living Transformation Strategy, a long-term goal of creating an entrepreneurial ecosystem in Charlevoix, and whether they needed a Michigan Main Street representative on the phone for the meeting. Director Dotson stated that the Economic Vitality Committee recommended approval of this strategy. She stated that Michigan Main Street will be presenting this strategy at the June 12th meeting. She stated that Charlevoix applied for their Market Study Update and the Business Recruitment Training which goes together with their long-term goal of creating an entrepreneurial ecosystem.

Motion by Member Wertz, second by Member Owens, to adopt the Health & Wellness Strategy of the National Main Street Program. Motion passed by unanimous voice vote.

b. Façade Grant Application – North Seas Gallery

Director Dotson stated that both applications were approved by the Design Committee. The North Seas Gallery application requested \$2,450 to replace awnings and windows on the building.

Motion by Member Owens, second by Member Wertz, to approve the façade grant for North Seas Gallery in the amount of \$2,450. Motion passed by unanimous voice vote.

c. Façade Grant Application – Kilwin's

The Kilwin's application requested \$1,037.50 to replace awnings. Director Dotson stated that if this grant was approved the remaining balance of the Façade Grant Program fund would be \$6,512.50.

Motion by Member Wertz, second by Member Christner, to approve the application for Kilwin's for an amount of \$1,037.50. Motion passed by unanimous voice vote.

d. Board Profile Worksheet Discussion

Chair Dipert stated that the purpose of the worksheet was to obtain information about the people currently serving on the Board, what their intentions are and whether they would want to hold office/continue on the Board. He encouraged members to complete the worksheet. Chair Dipert stated that they received a letter of resignation from Diane Dupont, so there is currently a vacancy on the Board.

9. Public Comment

None.

10. Request for Future Agenda Items

Member Owens suggested pursuing additional grant opportunities to help fund activities and events and the Board concurred.

11. Board Comments

None.

12. Adjourn

Motion by Member Christner, second by Member Wertz, to adjourn the meeting. Motion passed by unanimous voice vote. Meeting adjourned at 6:36 p.m.

Joyce Golding/fgm

City Clerk

Kirby Dipert

Chair

Charlevoix Downtown Development Authority/Main Street Work Session Minutes

Monday, June 12, 2017 – 5:30 p.m.
210 State Street, Charlevoix City Hall, Charlevoix, MI

The meeting was called to order at 5:30 p.m. by Chair Kirby Dipert.

1. Roll call

Chair:	Kirby Dipert
Members Present:	Richard Christner, Fred DiMartino, Maureen Owens, John Yaroch
Members Absent:	Tami Gillespie, Luther Kurtz, Rick Wertz
City Staff:	Lindsey Dotson, Executive Director
Others Present:	Dennis Kusina, David Grossi, Carissa Mullaney, Richard Hodgson, Leigh Young (Organization Specialist, Michigan Main Street Center/MEDC), Michelle Audette-Bauman (Economic Vitality Specialist, Michigan Main Street Center/MEDC), Patrice Martin (Innovative Community Solutions)

2. Facilitated Discussion

A. Transformation Strategy & Strategic Alignment Planning

Patrice Martin, Vice President of Innovative Community Solutions facilitated a discussion around establishing the goals related to the community transformation strategy that the DDA Board voted to adopt during the last Regular DDA meeting on May 22, 2017. A short term (3-5 year) strategy focusing programming on Health & Wellness was adopted as well as a long term (5+ years) strategy of creating an entrepreneurial ecosystem. Asset mapping for both of these areas revealed that Charlevoix already has many strengths/assets to build upon. Goals to address each strategy were drafted and read as follows:

- 1. Create the physical layout, amenities, and sustaining resources that demonstrate Charlevoix's commitment to year round health & wellness/healthy living.*
- 2. Develop a sustainable downtown that provides year-round economic opportunities to the greater Charlevoix community.*

Further discussion included possible measures of success, programming opportunities, and messaging. The next meeting on August 14th will involve all members of Main Street Committees to start developing work plans for the 2018/19 fiscal year.

3. Adjourn.

Meeting adjourned at 8:30 p.m.

Lindsey J. Dotson Executive Director

Kirby Dipert

Chair



Charlevoix Main Street

Promotions Committee Minutes

June 15, 2017 / City Hall; Council Chambers

I. Call to order: by Sarah Hagen at 8:01 a.m.

Members Present – Maureen Owens, Leanne Ackert, Larry Levensgood, Sarah Hagen, Jean Musilek, Amanda Wilkin, Katherine Forrester, Katie Peterson, Tim Salmonson, LaRae Stevens, Dan Barron, and Lindsey Dotson.

II. Approval of Minutes: May 18, 2017 – Correction: Dan Barron’s attendance was omitted. Approved with correction, moved: Leanne Ackert, seconded: Amanda Wilkin– Carried.

III. Recap:

- a. Live From Charlevoix – Round Lake Music Festival – Maureen Owens – Pleased with the overall reception and turn out for a first year event.
- b. Craft Beer Festival – Lindsey Dotson – Some push back on ticket pricing. The Committee needs more support and participation to help with Volunteers and Marketing, they may get Main Street involved again. May want to survey if there was any bump to businesses that are not in the immediate area.

IV. Project Updates from Sub-Committees:

Concert/Movie Series – Jean Musilek – All set for Concerts, buskers and movies. Assistance is needed for poster distribution; Leanne Ackert agreed to help. Being promoted on Instagram under “chxconcerts”, as well as Facebook.

Main Street Monday – There has been a slight adjustment in the timeline of the event, which will be handled by the Committee. Speakers are all lined up to represent each of the four Main Street Committees as well as highlighting an event or program from each group.

Live Life Local – The Chamber has agreed to pull the raffle license again, but want their entire member base to be represented. Discussions with this sub-committee will address this change going forward.

Other Updates: Camel Cup – This event is being moved to and run by the Elks Lodge on Saturday, September 16, 2017. This will be an Adult only, evening event and they will pull the license.

Branding: City Council tabled their decision until the July 3rd meeting in order to consider, review and obtain further input from their constituents. Attendance at the July meeting is encouraged to support the proposal.

V. Updates:

Main Street Refresh/Transformation Strategy – Michigan Main Street was here Monday night to meet with the DDA Board and the Chairs of the Committees to discuss the “Refresh”. The DDA has established a short-term goal of Health/Wellness, Healthy Living and a long-term goal of establishing an entrepreneurial ecosystem. Two goals were established from this meeting. There will be a follow up meeting on Monday, August 14th from 5:30pm until 8:30pm at the Charlevoix Public Library to develop a clear understanding of how these goals will impact each committee. It would be very beneficial for as many committee members as possible to attend this meeting. An annual calendar of work plans will likely be drafted at this meeting.

Market Study Update & Business Recruitment Training – Our application for these services was accepted and the process will begin soon to establish a new market study. There will be the need for a member/members of the Promotion Committee to become involved and an invitation will be issued when the time is appropriate. If this is something you may be interested in, please let Lindsey know.

Venetian Parade - Charlevoix Main Street is going to have an entry in the Venetian Parade to represent all the “shoulder season” events that we support. We are looking for volunteers to walk in the parade and help spread the word. There will be a parade meeting on Thursday, June 29th at 11:00 am in the Chamber office. Please attend if you are interested. If you cannot attend, but are interested in being involved, please let Lindsey know.

VII. Adjournment: 8:50 a.m. Motioned made by Tim Salmonson, seconded by Amanda Wilkin. Motion carried.

Main Street Economic Vitality Committee Meeting
June 13, 2017, 8am
Meeting Minutes

Present: Leigh Young, Michelle Audette-Baumann, Marie Eckstein, Rich Hodgson, Tim Fore, Maureen Owens, Dan Barron, Luther Kurtz, Lindsey Dotson, John Haggard, Kirby Dipert, Amanda Wilkin, Alison Hubbard, Mark Heydlauff, Rich Hodgson

Chair Rich Hodgson called the meeting to order at 8:01am.

Motion by Dipert, second by Owens to approve the minutes of the May 9, 2017 meeting. Barron clarified that we would be providing information about the room rental ordinance change; Dotson indicated it would be placed on the Main Street Website.

Motion carried.

Tim Fore discussed the Hospitality Training provided by Stafford's in May. The event was not well attended and the committee discussed opportunities for improvement next year.

Single room rental was approved by City Council. The Committee discussed how it might be implemented.

Lindsey Dotson discussed the ongoing updates to the property inventory database.

Lindsey Dotson indicated the City Council heard the branding presentation last week and is considering the matter at their July 3 meeting.

Tim Fore provided an overview of how properties have been sold and occupied. There has been a great deal of positive activity.

Michelle Audette-Bauman and Leigh Young from Michigan Main Street provided an overview of the National Main Street Refresh project. The Main Street Board held a strategy development meeting last night and focused on health and wellness. Going forward, this strategy will be implemented through further refinement with committee volunteers and board feedback. With the refresh of Main Street, they encourage us to look across different committees to undertake projects rather than being focused only on one committee per project.

Amanda Wilkin advised that we have been accepted for Market Study Update and Business Recruitment Training. This is a free service provided to us by Michigan Main Street. Lindsey Dotson suggested we include members of other committees as we move forward on this project.

Meeting adjourned at 9:01am.



Charlevoix

Main Street

210 State Street

Charlevoix, MI 49720

(231) 547-3257 | www.charlevoixmainstreet.org

Organization Committee Minutes

June 13, 2017 – 4:00pm

City Hall First Floor Conference Room

1. Meeting was called to order by Chairman Dennis Kusina at 4:01pm. Members present ; Lindsey Dotson Main Street Executive Director, Janet Kalbfell (City Council Member), Richard Christner, John Kurtz, John Yaroch, Maureen Owens, Greg Stevens
2. Minutes from the May Meeting were approved.
3. Old Business
 - a. John Kurtz suggested that we wait until August to send out or Pledge Letter reminders. At this time some many people are asking for donations. All agreed.
4. New Business
 - a. Main Street Monday is July 17th. Each Main Street Committee will have a Representative who will give an up-date on their committee. Maureen Owens will represent the Organization Committee. Junior Main Street will share their new APP. Jean Musilek will MC.
 - b. There are plans of having a "Main Street" Float in the Venetian Parade, there will be a float planning meeting on June 29th
 - c. The Downtown Transformation Strategy results were to work on a health, business Eco System, and create a Year Round Healthy Downtown.
 - d. There will be a Market Study Meeting with DDA/Main Street Board.
 - e. Meeting was adjourned at 4:58 pm.

Next meeting will be Tuesday July 11, 2017, at 4:00 in 1st Floor Conference Room, City Hall

[Home](#)[My Profile](#)[Project Information](#)[MEDC Programs](#)[My Applications](#)[My Awards](#)[Other Reports](#)**Michigan Main Street Monthly Report**

Report only those items occurring in your specific Main Street project area for this month

Metrics Number M-0000093504
 Account City of Charlevoix
 Reporting Period Start 5/1/2017
 Submitter's Name Lindsey Dolson

Status Submitted
 Name Judy Snell
 Reporting Period End 5/31/2017
 Due Date 6/10/2017

Design

Facade & Exterior Renovation in MSA: (exterior work only - painting, facade cleaning, signs, windows and awnings)

Business Name	Address	Project Description	Private Investment	Public Investment	Source of Public Fund
Round Lake Outfitters	405 Bridge Street	New signage	\$2,000.00		
The Clothing Company	339 Bridge Street	Storefront Improvements - new paint/caulking/old sign bracket removed, etc.	\$6,000.00		

Public Improvements in MSA: (Streets, sidewalks, lights and fixtures, landscaping and public amenities)

Business Name	Address	Project Description	Private Investment	Public Investment	Source of Public Fund
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Economic Vitality

Building Rehabilitation in MSA: (Interior rehab - building systems (HVAC), roof etc)

Business Name	Address	Private Investment	Public Investment	Source of Public Fund
Round Lake Outfitters	405 Bridge Street	\$3,400.00		
My Secret Stash	229 Bridge Street	\$3,000.00		

New Construction in MSA

Business Name	Address	Private Investment	Public Investment	Source of Public Fund
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Buildings Sold in MSA

Address	Amount of Sale
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New Business Opened in MSA

Business Name	Address	Type of Business	FTE Jobs Added	Part-time Jobs Added
My Secret Stash	229 Bridge Street	Retail Occupied	3.0	
The Cantina	101 Van Pelt Place	Food & Beverage	3.0	5.0
Northbound	217 Bridge Street Unit A	Retail Occupied	2.0	3.0
HotDoggers	117 Antrim Street	Food & Beverage	2.0	2.0
Ga Ga for Kids	323 Bridge Street	Retail Occupied	2.0	3.0
Charlevoix Yoga	103 W. Hurlbut	Service Business	1.0	1.0
52 Weekends	227 Bridge Street	Retail Occupied	2.0	2.0
Salon Beautiful You	100 Van Pelt Place Suite B	Service Business	4.0	0.0

Existing Downtown Businesses Contracted in MSA

Business Name	Address	Type of Business	Type of Contracted	FTE Jobs Lost	Part-time Jobs Lost
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Existing Downtown Businesses Expanded in MSA

Business Name	Address	Type of Business	Type of Expansion	FTE Jobs Added	Part-time Jobs Added
Salon Beautiful You	100 Van Pelt Place Suite B	Service Business	Product Line/Service	0.0	0.0
Business Name	Address	Type of Business	Type of Expansion	FTE Jobs Added	Part-time Jobs Added

Businesses Closed in MSA

Business Name	Address	Type of Business	FTE Jobs Lost	Part-time Jobs Lost
Salon Beautiful You	115 Antrim Street	Service Business	4.0	0.0

Businesses Moved out of Downtown

Business Name	Address	Type of Business	FTE Jobs Lost	Part-time Jobs Lost
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New Housing Completed Downtown

Type	# of Units	Address	Rent or Purchase Amount	Monthly Rent or Purchase Price
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Promotion

Downtown Events & Activities - All Committees

Event	Type	# of Attendees	# of Volunteer Hours	Total Cost	Gross Event Expenses Incurred by Main Street	Main Street Net Event Revenue
Hospitality Training	SE-Special Event	5	10	\$20.00	\$0.00	\$0.00
Dog Days of Spring - Farmer's Market	SE-Special Event	900	0	\$600.00	\$0.00	\$0.00

Organization

Volunteer Hours Last Month

MS Board	Organization Committee	Promotion Committee	Design Committee	Economic Vitality Committee	Total
32.00	44.00	124.00	10.00	27.00	237.00

Fundraising/Membership Last Month

Type	Amount
Earned	100.00
Private	4576.00

Training Sessions Attended

Event Title	Who Attended	Date	Topic
National Main Street Conference	Lindsey Dotson	5/1/2017	ALL THINGS MAIN STREET
Michigan Historic Preservation Network Annual Conference	Lindsey Dotson	5/18/2017	Historic Preservation
RRC Best Practices 1-3	Lindsey Dotson	5/23/2017	Redevelopment Ready Communities

Board Member Changes: Position Names Leaving and Names Arriving

Position	Name Leaving	Email	Name Arriving	Email
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Assistance Received

Grants	Source of Funds	Amount Received
Local	Charlevoix County Community Foundation	\$1,000.00

Other News or Commentary

We have a new Design Committee chairperson - David Grossl. He is a landscape architect who is new to town but has been involved for a while already and very engaged. We are still in the process of hashing out our new brand. The City Council saw a presentation on 6/5 but tabled their vote until their first July meeting. This also means Wayfinding continues to be on hold. Many new businesses are opening in town. Lots of construction continues with demo/rebuild of buildings affected by fires.

Program & Outlook

We are thrilled about the news of receiving the Market Study Update service, thanks! Farmer's Market has started out strong. Concert Series starts up soon, and summer seems to be here. Also looking forward to some planning related to the refresh next week.

Suggestions for State and National Staff

n/a

Upload Attachments

Attach a copy of meeting minutes from last month's board meeting and copies of meeting minutes from committee meeting

Name	Date Uploaded
dda agenda pkt 5-22-2017.pdf	6/9/2017 4:36 PM



Main Street/DDA Board 2017 Regularly Scheduled Meetings

*All regularly scheduled meetings are at
5:30 pm at Charlevoix City Hall
210 State Street, Charlevoix, MI 49720
Second floor Council Chambers*

~~January 23, 2017~~

~~February 27, 2017~~

~~March 27, 2017~~

~~April 24, 2017~~

~~May 22, 2017~~

June 26, 2017

July 24, 2017

August 28, 2017

September 25, 2017

October 30, 2017

~~November 27, 2017 (cancel)~~

December 19, 2017 (Tuesday)

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CITY OF CHARLEVOIX

210 STATE STREET | CHARLEVOIX, MICHIGAN | 49720

Charlevoix Main Street DDA
(231) 547-3257 lindseyd@cityofcharlevoix.org

Memo

To: Charlevoix Downtown Development Authority/Main Street Board
From: Lindsey J. Dotson, Main Street/DDA Executive Director
Subject: Director's Report
Date: June 26, 2017

Downtown Maps & Kiosks

The maps have been through two rounds of proofing with help from staff members at the Charlevoix Area Chamber of Commerce and the Convention and Visitors Bureau. The last edits were picked up by Harbor House Publishers on Friday, June 23rd so they should be finished soon.

Venetian Festival Commercial

Since Main Street DDA is a supporter of the Charlevoix Venetian Festival I was asked to be filmed for a commercial that will be shown online. Keep an eye out for it!

Main Street Monday – July 17th

The Main Street Monday subcommittee has met twice to plan our stage presence on Main Street Monday during Venetian Festival. We have been given three 10 minute slots to fill with content between performances. Jean Musilek has agreed to facilitate discussion again this year. The schedule is as follows:

7:45pm Presentation #1
8:15pm Presentation #2
9:15pm Presentation #3

Content will include the following:

What is Main Street? – Maureen Owens
Design Committee/Façade Grants slide show – Lindsey Dotson
Charlevoix Farmer's Market – Chris Leese
Farmer's Market business incubator success story – Harwood Gold

Restaurant Week success – Grey Gables

Live from Charlevoix – Tim Fore

Junior Main Street Mobile App demonstration – McKenna Ebert

How to get involved – Jean Musilek

Farmer's Market Cooperative Advertising Campaign

The downtown merchants have created a new program to cross-promote the Farmer's Market and their businesses to encourage market shoppers to also spend time downtown while they are here on Thursdays. 200 cards are given to market vendors and they hand one out to each customer. That card can then be taken to a participating business for a special deal that day only. Those participating businesses now have small counter top displays encouraging customers to shop at the market on Thursdays so that they can return for a special deal on the same day.

Potential Downtown Historic District

The State Historic Preservation Office has presented us with an area of our downtown (the 200 block of Bridge Street and Van Pelt Place) that has enough 'contributing' historic buildings to be nominated for a National Register Historic District. A National Register district is simply an honorific designation signifying the importance of the area's history and is not restrictive in any way. A benefit is available to those in the district with a 'contributing' building – a 20% Federal Tax Credit for major rehabilitation projects. The Main Street Design Committee and the Charlevoix Historic District Commission/Study Committee have all expressed their support in moving forward with this nomination. Debra Ball Johnson from the State Historic Preservation Office has attended two meetings to inform the public of what this would mean for them, including the latest Downtown Business Owner meeting on June 19th. We asked property owners in the room if anyone objected to moving forward and heard no issues raised. At this time we are still working to communicate with all property owners in the 200 block to know if we have the 50% support we need to move forward. If anyone asks you about this topic please stress to them that this is NOT a local historic district with a design review for building changes. The National Register District provides no protections or design guidelines for buildings, it is again an honorary designation. Stay tuned for more to come. Please do not hesitate to ask me questions if you have any. Thank you!

Pardon our Dust Signage

We recently ordered some posters & signage to place outside of the construction site of the Trademark Building to encourage people to keep walking past the fences and into the alley. We also partnered with the Chamber to do a photo shoot of the new business owners who opened in Van Pelt Alley wearing hard hats to say that they are open during construction. This image was shared widely amongst social media platforms and email newsletters.

Main Street Refresh – Downtown Transformation Strategy Development & Alignment

MARK YOUR CALENDARS: 2018 Work Planning with strategy (Board & Committee members) – **August 14th 5:30 – 8:30 pm @ Public Library.** We will identify projects and programming and measures of success to implement our new transformation strategies.



CITY OF CHARLEVOIX

210 STATE STREET | CHARLEVOIX, MICHIGAN | 49720

Charlevoix Main Street DDA
(231) 547-3257 lindseyd@cityofcharlevoix.org

Memo

To: Charlevoix Downtown Development Authority/Main Street Board

From: Lindsey J. Dotson, Main Street/DDA Executive Director

Subject: Branding Update

Date: June 26, 2017

On June 5th John Harris from a5 came to Charlevoix to present the DDA Board's recommended concept to City Council. Council decided to table any decision until the July 3rd meeting.

In other news: on June 5th John Harris also met with organizers of the Summer Concert Series & Restaurant Week to get more input on the event logo designs. We have a phone call scheduled on July 6th or 7th to see the first round of logo designs (also including the Farmer's Market & a generic logo that can be used for all downtown events).



CITY OF CHARLEVOIX

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Charlevoix Main Street DDA

(231) 547-3257 lindseyd@cityofcharlevoix.org

Memo

To: Charlevoix Downtown Development Authority/Main Street Board

From: Lindsey J. Dotson, Main Street/DDA Executive Director

Subject: Live, Life, Local Campaign Update

Date: June 26, 2017

Back in April members of the Charlevoix Area Chamber of Commerce Executive Board met with myself, Kirby Dipert, Mayor Luther Kurtz, and Mark Heydlauff to discuss topics related to the DDA & Chamber's working relationship. One topic that was discussed was whether or not the Chamber would pull the raffle license for our Live, Life, Local Shopping Campaign again this year. After much discussion they agreed to pull the license if the contest were not to exclude Chamber members outside of the downtown district.

Since then, Kirby Dipert and I met with the project creator/lead Jodi Bingham to discuss this matter. Since the project's original intent is to encourage people to "shop small" in the downtown district it was decided to seek out another organization to pull the raffle license. The organizers of Live from Charlevoix agreed to obtain their 501c3 status with the IRS so that they could pull the license for the campaign.

Logistics are still being worked out for prizes and a work plan will be presented to you for approval before the project starts, but I wanted everyone to know the direction the project is moving this year. I would like to thank the staff and board members of the Chamber for helping us out so much in years prior. Their time and resources put into this campaign are invaluable.



CITY OF CHARLEVOIX

210 STATE STREET | CHARLEVOIX, MICHIGAN | 49720

Charlevoix Main Street DDA

(231) 547-3257 lindseyd@cityofcharlevoix.org

Memo

To: Charlevoix Downtown Development Authority/Main Street Board

From: Lindsey J. Dotson, Main Street/DDA Executive Director

Subject: Application Based Services Update

Date: June 26, 2017

Our application to the Michigan Main Street Center was approved and we have been awarded a Market Study Update and Business Recruitment Service which will be conducted by Downtown Professionals Network out of Nashville, TN. See following documents for more information.



Michigan Main Street Center

Site Visit One Planning Guide

2017 Advanced Level Market Study Update & Business Development Services

ITINERARY

Site Visit One Charlevoix

Thursday, August 10, 2017

- | | |
|--------------------|---|
| 9:00 to 9:30 a.m. | Meet with staff (and local project team leader – optional)
Location: <u>First Floor Conference Room @ City Hall</u> |
| 9:30 to 11:30 a.m. | Conduct walking and driving tours |
| 12:00 to 3:00 p.m. | Conduct three-part work session with the local project team to:
a. Review the Market Snapshot document
b. Review, update or develop a preliminary target list of business types and concepts targeted for expansion and recruitment
c. Discuss assignments and logistics related to the development, promotion and administration of the "Top Prospects" survey
Location: _____ |
| 3:00 to 4:00 p.m. | Exit session with staff, if necessary |

Preparations

(Also see reverse side for tasks to complete in advance and MMSC/DPN contacts)

Prior to the first site visit:

- ☐ Organize your local project team.
- ☐ Make and furnish copies of the "Project Overview" document and this Site Visit One Planning Guide to local project team members, or distribute to team members electronically.
- ☐ Conduct a meeting with the local project team in advance of the MMSC/DPN team's first site visit to review and assign the list of "In Advance" action items and assignments to team members, as relevant and applicable. (See following page)
- ☐ Make preparations for the driving and walking tours to be conducted during the first site visit. Consider who should accompany the MMSC/DPN team, the driving tour route, the vehicle to be used, etc.
- ☐ Identify and confirm meeting locations with the MMSC/DPN team at least ten days in advance of your scheduled visit. Please select a location and space for the project team work session that will accommodate a PowerPoint-style presentation.
- ☐ Make and furnish copies of the Market Snapshot document (to be emailed in advance by DPN) to local project team members, or distribute to team members electronically in advance of the first site visit.



Site Visit One Description and Planning Guide

In Advance

(Complete and submit to MMSC/DPN by July 31, 2017)

Participating Main Street organizations are encouraged to use the time leading up to the first site visit to prepare, and thereby maximize the value of services being delivered. Following are examples of tasks and activities that the local project team/EV committee may wish to undertake, as appropriate.

1. Complete a review of the most recent market study and make note of:
 - General market/economic trends and changes that have occurred in the Main Street Area, the community, and the trade area since completion of the last study
 - Businesses in the Main Street Area that have opened and closed since completion of the last study; and other major investments and developments that have occurred
 - Economic Vitality committee projects that have been completed since the last study – or those that are ongoing and that have been completed within the last two years
2. Update the Main Street Area business inventory; compile a list and map properties and spaces currently available for sale or lease.
3. Compile copies of the following materials, as available and **submit to the MMSC/DPN team by July 31, 2017** (electronic file copies submitted via email preferred):
 - Summary or notes from the project team's review per item #1 above
 - Current EV committee work plan
 - Current list and/or map showing properties and spaces currently available for sale or lease.
 - List of business types currently targeted for expansion and recruitment (may be updated from previous market study)
 - Examples of marketing materials used for business recruitment (Hard copies may be provided to team during first site visit)
 - Any other information or examples that could be helpful to the MMSC/DPN team's preparation and work

Questions? Contact:

Jay Schlinsog, DPN
Telephone: (615) 236-6082
Email: jay@downtownpros.com

Michelle Audette-Bauman, Michigan Main Street Center
Telephone: (517) 388-4829
Email: audette-baumanm@michigan.org



Michigan Main Street Center

Overview and Schedule

2017 Advanced Level Market Study Update & Business Development Services
For Boyne City, Charlevoix and Lansing | V2 | 06.02.17

Master Project Schedule (V2)

Activities/Tasks:	Complete by:
A. Conduct Pre-service Call with MMSC/DPN team and local staff & project leader	On June 30, 2017
B. Complete Advance Work and submit to MMSC/DPN (See page 5)	July 31, 2017
1. Market Snapshot	August 4, 2017
2. Site Visit One – Project Launch and Refresher	
— Boyne City	► August 9, 2017
— Charlevoix	► August 10, 2017
— Lansing	► August 11, 2017
3. Top Prospects Survey	September 8, 2017
4. Site Visit Two – Opportunities, Top Prospects and Recruitment Test Prep	
— Lansing	► September 20, 2017
— Boyne City	► September 21, 2017
— Charlevoix	► September 22, 2017
5. Site Visit Three – Recruitment Test	
— Lansing	► November 1, 2017
— Boyne City	► November 2, 2017
— Charlevoix	► November 3, 2017
6. Site Visit Four – Progress Visit	
— Boyne City	► December 5, 2017
— Charlevoix	► December 6, 2017
— Lansing	► December 7, 2017

► Indicates MMSC/DPN Team on site

Overview

2017 Advanced Level Market Study Update & Business Development Services

For Boyne City, Charlevoix and Lansing

Introduction

Advanced level market study and business development services are specifically designed for communities that have previously completed a market study; have a need to update market information; and/or are seeking to take the scope of Economic Vitality (EV) and business development efforts to a new level. The advanced level program capitalizes upon past investments of time and effort, serves to re-energize local staff and volunteers participating in the process, and optimizes the products of these efforts to elevate local business improvement and development initiatives. The service is highlighted by a “Recruitment Test” designed to assess the community’s business recruitment readiness, strategy and process, and to offer practical guidance and recommendations for recruitment process enhancements.

Scope of Services and Deliverables

Activity A: Pre-service Call

DPN will participate in conference calls scheduled by Michigan Main Street Center (MMSC) with project representatives from each participating community to provide an overview of the project and project schedule, discuss assignments to be completed by the local Main Street organization in advance, outline expectations and answer questions.

Activity One: Market Snapshot

DPN will procure and summarize current Esri reports for each Main Street Area’s five, ten and twenty-minute drive time areas. The Market Snapshot will update, summarize and highlight key demographic and lifestyle characteristics and trends; and summarize sales gap (retail leakage & surplus) analysis results. The Market Snapshot document will be delivered in digital media file (.pdf) format prior to the first site visit.

Activity One Deliverables

- ▶ Market Snapshot document, delivered via email as a .pdf document. The summary report will include and/or incorporate:
 - Five, ten and twenty-minute drive time area map
 - Summary of Esri demographic, lifestyle and retail data for the drive time areas.

Activity Two: Site Visit One – Project Launch and Refresher

DPN will conduct a one day site visit in each community to: conduct local Main Street organization-led walking and driving tours; to make introductions and discuss recent, current and planned EV activities in each community; and to facilitate a “refresher course” designed to help each Main Street organization assess directions and strategies based on changes that may have occurred in the Main Street Area since the previous market study was completed. A three-hour local project team/EV committee work session will be facilitated to:

- ▶ Review and discuss the updated Market Snapshot report with particular focus directed toward identifiable changes and trends in the marketplace and implications for existing and new business development strategies and techniques.
- ▶ Review, discuss and/or update a preliminary target list of specific business types and concepts targeted for expansion and recruitment in the Main Street Area.
- ▶ Discuss and verify assignments, timelines and methods for the development, administration and promotion of an online “Top Prospects” survey. The survey’s content will be developed by the local Main Street organization, with instructions and guidance from DPN. The online survey questionnaire will be developed and hosted by DPN, and the local Main Street organization will be responsible for promoting the survey using social media and other locally-selected channels.

Overview

2017 Advanced Level Market Study Update & Business Development Services

For Boyne City, Charlevoix and Lansing

Activity Two Deliverables

- ▶ One day site visit and facilitated work session
- ▶ Preliminary list of business types and targeted for expansion and recruitment in the Main Street Area
- ▶ Action plan for developing, promoting and collecting local input via an online “Top Prospects” survey developed in collaboration with the local project team and administered by DPN

Activity Three: Top Prospects Survey

DPN will work with the local project team in each community to develop, promote and administer DPN’s “Top Prospects” online survey to gather public input designed to assess opportunities and profile prospects for targeted for expansion and recruitment in the Main Street Area. DPN will compile, summarize and transmit results of the “Top Prospects” survey in a summary document prior to the second site visit.

Activity Three Deliverables

- ▶ “Top Prospects” survey summary transmitted electronically to each community in advance of the second site visit.

Activity Four: Site Visit Two – Opportunities, Top Prospects and Recruitment Test Prep

DPN will conduct a half-day site visit and will facilitate a three- to four-hour EV committee/local project team work session to:

- ▶ Review and discuss results of the “Top Prospects” survey and implications for business types targeted for expansion and recruitment in the Main Street Area.
- ▶ Select a business type to be “recruited” by the local recruitment team during the “Recruitment Test” site visit (Activity Five).
- ▶ Facilitate a “Ready to Recruit” workshop to discuss and provide examples of recruitment strategies, methods and action items appropriate to the Main Street Area and local organization; and to help the local project team prepare for the “Recruitment Test” site visit (Activity Five). Information and topics covered as part of the session include:
 - Organizing the recruitment process
 - Recruitment marketing materials and tools
 - Identifying and pursuing “top prospects”
 - Orchestrating a recruitment visit
 - Preparing for the “Recruitment Test”

Activity Four Deliverables

- ▶ Half- day site visit and facilitation of a three- to four-hour work session
- ▶ Updated or refined list of business types targeted for expansion and recruitment in each Main Street Area
- ▶ Presentation and walk-through of a Test Prep Memo containing a “to do” checklist to help the local project/recruitment team prepare for the “Recruitment Test”

Overview

2017 Advanced Level Market Study Update & Business Development Services

For Boyne City, Charlevoix and Lansing

Activity Five: Site Visit Three – “Recruitment Test”

DPN will conduct a one-day site visit to provide training and services designed to help each local Main Street organization develop and enhance business expansion and recruitment efforts. The visit will be highlighted by a real “test” of each organization’s business recruitment strategy and process.

A DPN recruitment specialist will play the role of “prospect.” The recruitment team in each community will be responsible for recruiting the mock prospect: from extending the invitation; to providing background information and materials; to conducting tours and showing the recruit appropriate and available properties; to discussing assistance and/or incentives available to the prospect; and other related activities.

Upon conclusion of the recruitment test exercise, the DPN team will deliver a preliminary, on-site verbal critique to discuss the local team’s performance and discuss proposed action steps for improvements that could enhance the community’s prospects for recruitment success. A brief written critique, along with recommendations and relevant examples, if any, will be emailed to each Main Street organization within thirty (30) days of the site visit.

Activity Five Deliverables

- ▶ One-day site visit and conduct of the “Recruitment Test”
- ▶ Verbal “Recruitment Test” critique and evaluation delivered on site following the Recruitment Test, including discussion and recommendations for refining or enhancing each Main Street organization’s process, materials and techniques.
- ▶ A brief Recruitment Test memo summarizing the local team’s performance on the Recruitment Test and outlining recommendations and proposed action steps for improvements, delivered in digital media file (.pdf) format within thirty (30) days following performance of the Recruitment Test visit in each community.

Activity Six: Site Visit Four – Progress Visit

DPN will conduct a half-day site visit to discuss and review progress on proposed action steps outlined in the Recruitment Test memo, with focus directed toward recommendations and proposed action steps appropriate for inclusion in each organization’s work plans. We will offer our best evaluation for moving forward, which could include suggestions, recommendations and examples for:

- ▶ Revisions, refinements and additions to the EV committee’s (or other appropriate committee’s or project team’s) work plan(s)
- ▶ Suggestions for additional training or technical services that might be provided by or through MMSC
- ▶ Means and methods to update the Market Snapshot, or other business recruitment and business development-related collateral materials, in the future

Within two (2) weeks following the Progress Visit or by December 31, 2017, DPN will prepare and deliver via email a Progress Visit Memo providing a brief synopsis of our findings along with suggestions and recommendations for next steps and/or future projects and actions.

Activity Five Deliverables

- ▶ Half day site visit and work session with EV committee/local project team
- ▶ Progress Visit Memo, delivered in digital media (.pdf) format within two weeks following the visit, outlining suggestions and recommendations for next steps and/or future projects

Overview

2017 Advanced Level Market Study Update & Business Development Services

For Boyne City, Charlevoix and Lansing

In Advance

(Complete and submit to MMSC/DPN by July 31, 2017)

Participating Main Street organizations are encouraged to use the time leading up to the first site visit to prepare, and thereby maximize the value of services being delivered. Following are examples of tasks and activities that the local project team/EV committee may wish to undertake, as appropriate.

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 - Summary or notes from the project team's review per item #1 above
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 - Current list and/or map showing properties and spaces currently available for sale or lease.
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 - Examples of marketing materials used for business recruitment (Hard copies may be provided on site during first site visit)
 - Any other information or examples that could be helpful to the MMSC/DPN team's preparation and work

Questions? Contact:

Jay Schlinsog, DPN
Telephone: (615) 236-6082
Email: jay@downtownpros.com

Michelle Audette-Bauman, Michigan Main Street Center
Telephone: (517) 388-4829
Email: audette-baumanm@michigan.org

Agreement

This agreement is made effective as of _____ day of _____, 2018 by and between the City of Charlevoix, Main Street DDA and the Charlevoix Area Chamber of Commerce.

The purpose of this Agreement is for the City of Charlevoix, Main Street DDA to provide financial support for the Downtown events (listed below), specifically within the DDA and Main Street Districts.

The activities to be provided by the Charlevoix Area Chamber of Commerce include but are not limited to the planning and execution of promotional events focused on retail, restaurant, and service businesses in the Main Street district.

- Winter Sidewalk Sales
- Easter Egg Hunt
- Summer Open House
- Summer Sidewalk Sales
- Holiday Parade & Tree Lighting
- Merchant Open House

The City of Charlevoix, Main Street and the Charlevoix Area Chamber of Commerce mutually and expressly agree to the following:

- The Chamber shall perform any and all work required for the staffing, administration, coordination, promotion and execution of the above promotional events focused on retail, restaurant, and service businesses in the Main Street district.
- The Main Street program agrees to advertise in conjunction with the Chamber on all the downtown events through all available media channels.
- The Main Street program agrees to provide access to Main Street Volunteers for said events.
- Main Street shall compensate the Chamber with an annual payment of Ten Thousand Dollars (\$10,000).
- The term for this event agreement would be for a 3 year period starting in January of 2018 through December of 2020 for review in September of 2020 for an additional 3 year term.
- No later than December 1, of each year, the Chamber shall submit a written report documenting the previous year's events.

This agreement contains the entire agreement between the parties and may not be amended or modified without the express written consent of the City of Charlevoix, Main Street and the Charlevoix Area Chamber of Commerce.



Charlevoix Main Street Façade Incentive Grant Program Application

Applicant's Name: John Murray Phone # 231-625-9905
Business Name Townhouse Bar
Property Owner's Name Townhouse Partners, LLC
Project Address 231 Bridge St., Charlevoix, MI 49730
Parcel # 15-052-265-003-00
Mailing Address (Applicant) 203 Bridge St.
Charlevoix, MI 49730

The work to be performed in connection with the Charlevoix Main Street Façade Incentive Grant Program, for which the Applicant will be reimbursed, is outlined below:

Improvement(s) Planned (check whichever applies)

- ☐ Exterior brick or wall surface cleaning
☐ Pointing of brick/Mortar joint repair
☒ Patching and painting of façade walls
☐ Window and/or door replacement/repair
☐ Cornice repair and/or replacement
☒ Other (please specify) NEW SIGNAGE?

Façade(s) Impacted (check whichever applies)

- ☒ Front ☐ Rear ☐ Side ☐ Corner lot

Total Cost of Improvement \$ \$5,622.00

Incentive Amount Requested \$ \$2,811.00

The following information must be submitted with your application to ensure quick processing:

1. Project Improvement Plans drawn to scale, if applicable

2. Samples of paint colors to be used in façade improvements
3. Photograph(s) of existing condition of property
4. Historic photo of building(s), which can be found in the archives of the Charlevoix Historical Society
5. Proposed budget and detailed cost estimates for work
6. Written permission by property owner, if tenant
7. Proof of payment of taxes (available at Charlevoix City Hall)
8. \$250 application fee (check payable to Charlevoix Main Street)
9. Proof of project funding

The Applicant certifies and agrees to the terms and conditions set forth below:

1. The Applicant is the owner or tenant of a property in the Charlevoix Main Street Façade Incentive Grant Program Target Area as outlined in the Charlevoix Main Street Façade Incentive Grant Program Guidelines Exhibit "A", hereinafter referred to as "Program Guidelines".
2. The Applicant is in good standing with the City of Charlevoix in terms of payment of taxes and utilities.
3. The Applicant agrees to be bound by the rules as outlined in the Façade Grant Incentive Program Guidelines and should consult the Downtown Charlevoix Design Guidelines (see Exhibit C) when making decisions regarding the aesthetic quality of the façade design.
4. All improvements to be undertaken will be consistent with all applicable zoning and building codes. Further, if review is necessary by the Charlevoix Planning Commission in accordance with the Charlevoix Zoning Ordinance, the review will be conducted before the work on the façade begins. Applicant must pay all relevant fees.
5. Only the work that is outlined on the application will be eligible for reimbursement.
6. The project must be completed within one year of approval of the application. There are no extensions of grant funds. The project is not eligible for reimbursement if the work is not completed during the approved time period.
7. Funds are awarded on a reimbursement basis. Disbursement of funds shall be made only after the entire project is complete and certified by City staff and the grant inspector to be in compliance with the approved design. The work must also adhere to any required inspections (e.g. Charlevoix County) before funds are disbursed for reimbursement. The Applicant must submit copies of invoices, receipts and an itemized statement of the total cost of the project, signed by the applicant. All documentation for payment must be provided at one time to Charlevoix Main Street for one payout, and the receipts must be provided no later than fifteen (15) months after the application has been approved. Payment will be made to the applicant by Charlevoix Main Street within 4-6 weeks. Charlevoix Main Street will only make checks payable to the Applicant. The amount of the reimbursement must adhere to the Program Guidelines. The specific amount is outlined in the application.
8. The Applicant understands that he/she is responsible for the construction management for the entire project.

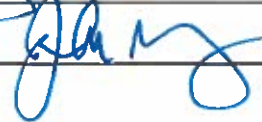
9. The grant money awarded will be in keeping with the Façade Grant Incentive Program

Guidelines and shall not exceed the amount as outlined in the application.

10. It is expressly understood and agreed that the Applicant shall be solely responsible for all safety conditions and in compliance with all federal, state, and local safety conditions, safety regulations, building codes, ordinances and other applicable regulations.

11. The applicant shall, at his/her own expense, indemnify, protect, defend and hold harmless Charlevoix Main Street and/or its agent and employees, from all claims, damages, lawsuits, costs, and expenses, for any property damage, personal injury or other loss relating in any way to the Charlevoix Main Street Façade Incentive Grant Program.

12. The Applicant understands that he/she is responsible for the maintenance of the façade improvements described here for a period of ten years from the project completion.

Applicant's Signature  Date 6-14-17
Property Owner's Signature  Date 6-14-17

Complete and return to:

Charlevoix Main Street
210 State Street
Charlevoix, MI 49720
(231) 547-3257

8/20/18

Page
U 9

Block

MAU

TRM

PANTONE Yellow 012 84.14
PANTONE Orange 021 13.06
PANTONE Black 2.80

PANTONE 7551 U

PANTONE Yellow 012 78.49
PANTONE Orange 021 15.30
PANTONE Black 6.22

PANTONE 7552 U

PANTONE Yellow 012 63.14
PANTONE Orange 021 17.19
PANTONE Black 19.67

PANTONE 7553 U

PANTONE Yellow 012 51.53
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PANTONE 7554 U

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PANTONE Black 22.04

PANTONE 7550 U

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PANTONE Black 12.75

PANTONE 7558 U

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PANTONE 7559 U

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PANTONE Orange 021 9.78
PANTONE Black 6.12

PANTONE 7557 U

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PANTONE 4516 U

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PANTONE Black 4.40
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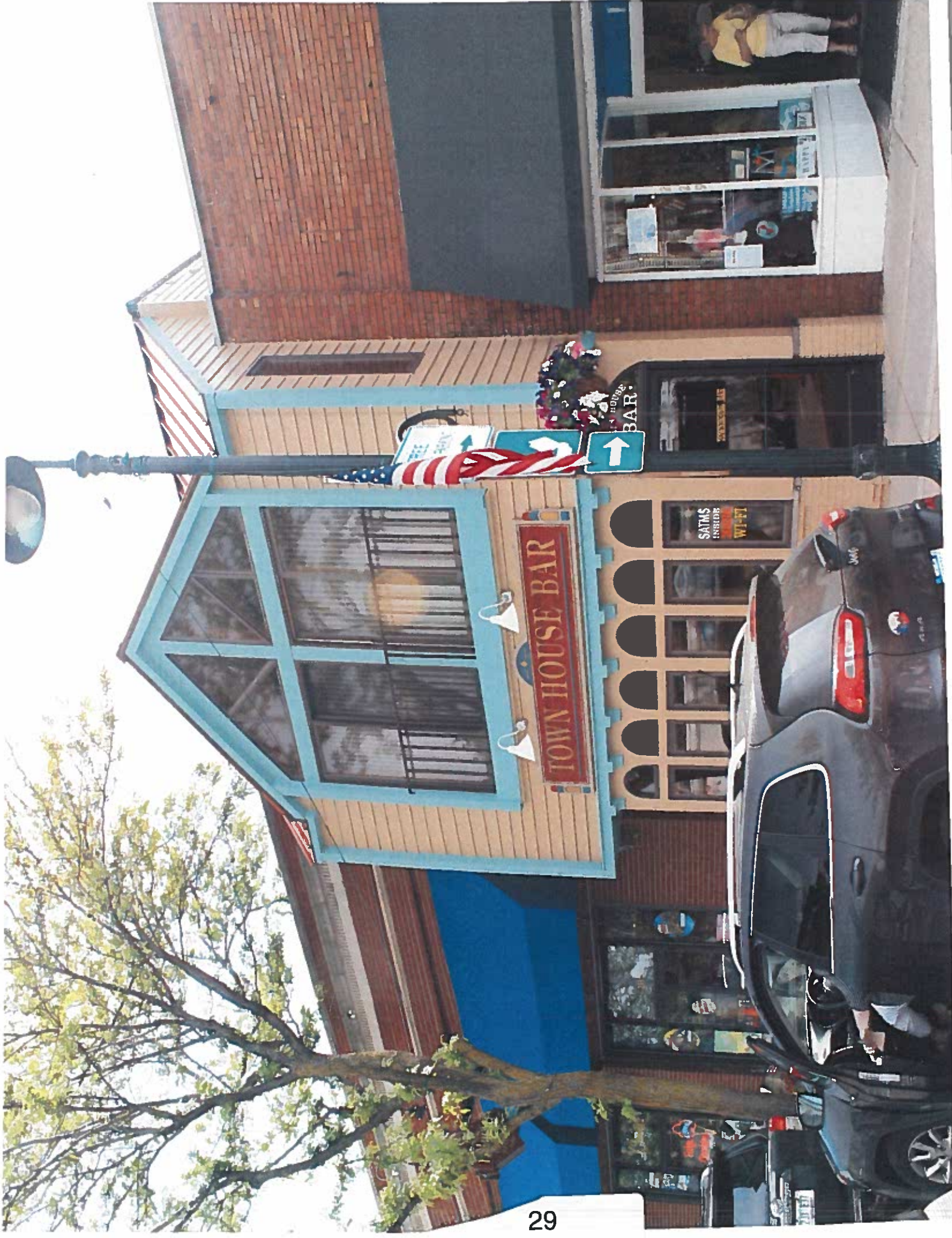
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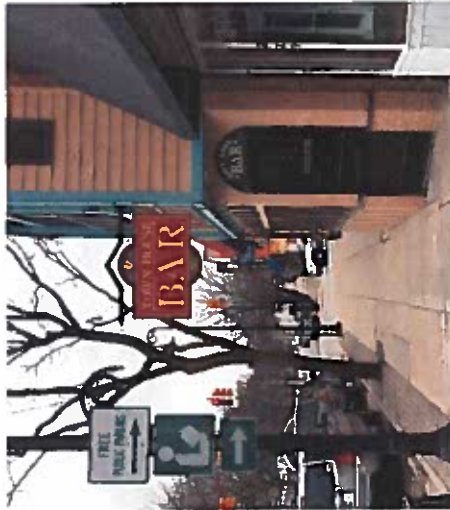




PLEASE CHECK ALL INFORMATION CAREFULLY

		TRAVERSE CITY • PETOSKEY • TORCHIER • 231.392.8052	
CLIENT	DESCRIPTION	APPROVED BY	APPROVAL DATE
Town House Bar	Building Point		

Pro Image Design will make changes ONE time after production of initial concept, from that point any revisions will be billed at \$85 per hour. This preparatory /and/or art work created or furnished by PRO IMAGE DESIGN shall remain their exclusive property and no use of the same shall be made, nor ideas obtained from be used. If reproduction does occur, PRO IMAGE DESIGN expects to be reimbursed any and all costs incurred in compensation for time, materials, and effort entailed in creating these plans. — All artwork is the property of Pro Image Design • Copyright 2016



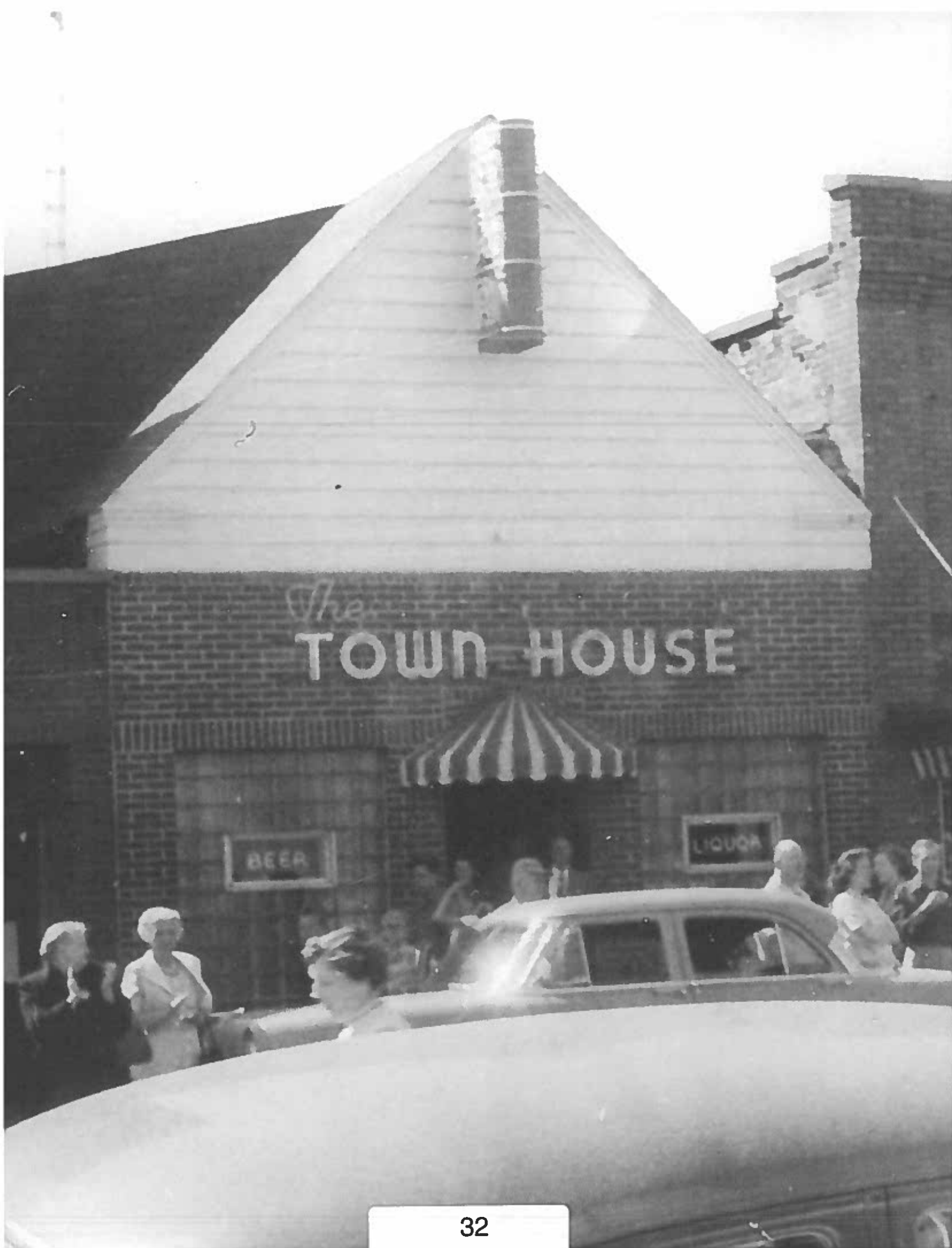
PLEASE CHECK ALL INFORMATION CAREFULLY

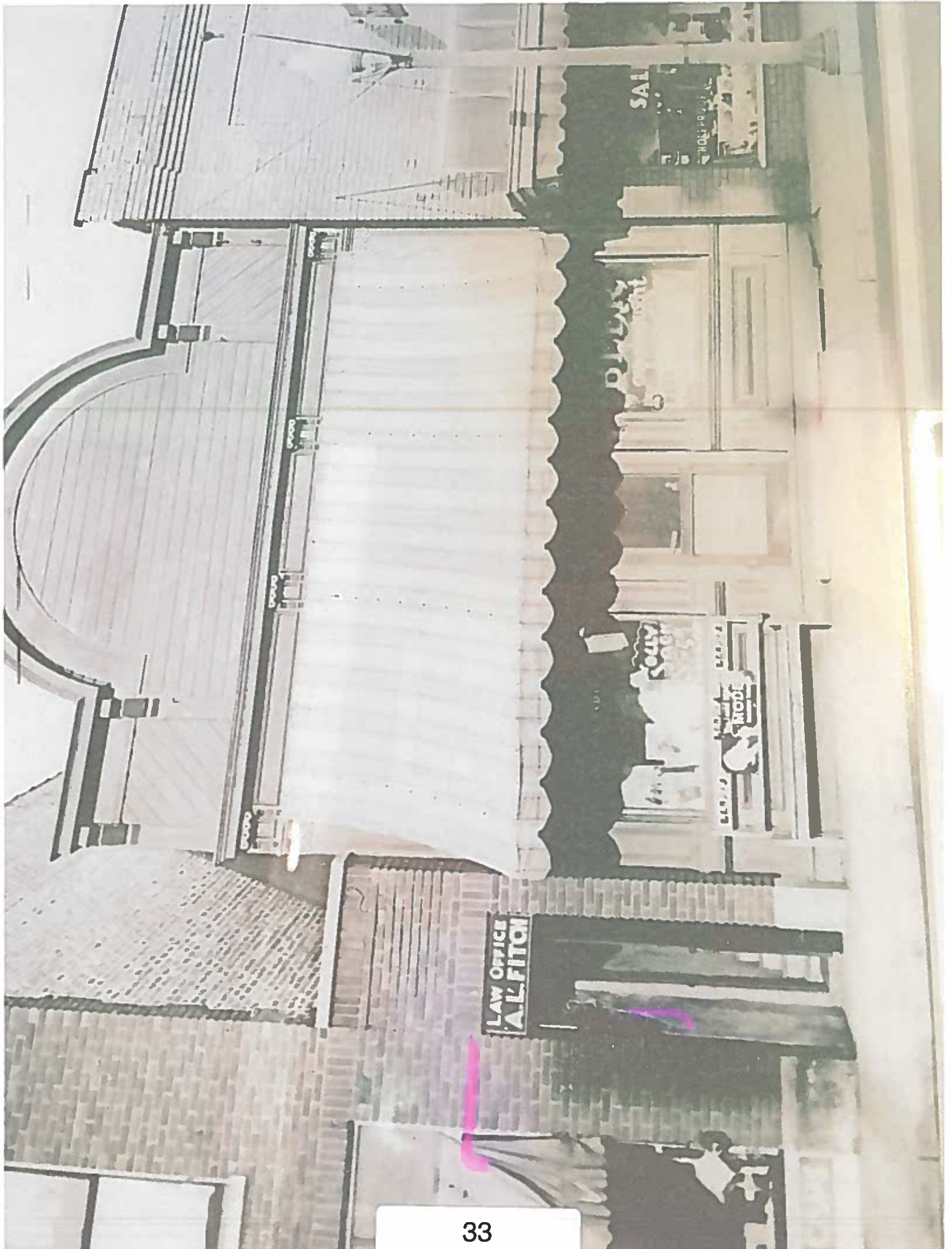
TRAVERSE CITY • PETOSKEY • TORCH RIVER • 231-372-8052



CLIENT	DESCRIPTION	APPROVED BY	APPROVAL DATE
Town House Bar	Building Signs		

Pro Image Design will make changes ONE time after production of initial concept, from that point any revisions will be billed at \$85 per hour. This preparatory /and/or art work created or furnished by PRO IMAGE DESIGN shall remain their exclusive property and no use of the same shall be made, nor ideas obtained from be used. If reproduction does occur, PRO IMAGE DESIGN expects to be reimbursed any and all costs incurred in creating these plans. – All artwork is the property of Pro Image Design • Copyright 2016







ESTIMATE

All-In-One Paint and Stain
3066 Black Road
Charlevoix, MI 49720
231-350-3601

DATE: MAY 3, 2017

TO: John Murray
Town house ext

ITEM #	DESCRIPTION	QUANTITY
	Work to be done:	
	Power wash of structure	
	Scrape and sand all areas where needed	
	Prime all areas where needed	
	Caulk all areas where needed	
	Apply two coats of Sherwin Williams Duration to all trim and doors	
	Apply two coats of Duration to body of building	
	 Material and labor included	
		Total>>>> \$1,955.00

Estimate is good for 30 days
50% due at start and 30% due at half way and 20% when finished

Please contact Tony Warchol at 231-350-3601 with any questions or comments.

Thank you for your business!



"Quality Coatings since 1991"

Licensed and Insured • Painting • Staining
Decks • Drywall Work
Power Washing • Interior and Exterior
New Construction • Painting Maintenance

Proposal

May 26, 2017

Proposal # 52617TH

Town House
231 Bridge St.
Charlevoix, MI 49720
Attn: John Murray

RE: Exterior Painting

We hereby propose to furnish all material and perform all labor for the completion of painting the exterior front of the building at the above-mentioned location. This includes:

- Power washing with a biodegradable house wash to clean and remove mildew.
- All Necessary prep work such as caulking, removing loose paint and spot priming bare wood to assure a quality finish.
- Two coats of Benjamin Moore exterior latex finish paint on all previously painted siding, trim and brick to change the color.

Notes:

- Does not include factory finished windows or doors.
- Does not include areas on the roof that are not visible from below.
- Does not include the back side of the building.

All Materials is guaranteed to be as specified and the above work to be performed and completed in a substantial workmanlike manner for the sum of:

Two Thousand Nine Hundred Eighty and 00/100.....Dollars (\$ 2,980.00)

With payments to be made as follows: 50% to schedule with the remainder due upon completion of job.

Any alterations or deviation from above specifications involving extra costs will be executed only upon written orders and will become an extra charge over and above the estimate billed at \$ 35.00 per man-hour or by quote.

3 Guys Painting are licensed by the State of Michigan (License # 2104103781 and 2103187687) and has Liability and Worker's Compensation insurance coverage. Documentation of this will be submitted upon request.

Important Note: A residential maintenance and alteration contractor (Painter) in Michigan is required by law to be licensed under Article 24 of Act 299 of the Public Acts of 1980.

ACCEPTANCE OF PROPOSAL

The above price, specifications and conditions are satisfactory and are hereby accepted. You are authorized to do the work as specified. Payment will be made as outlined above. This proposal may be withdrawn if not accepted within 30 days.

Accepted _____ Date _____

ESTIMATE

March 16, 2017

Mark White Painting
5565 M-66 N
Charlevoix, MI. 49720

To: Townhouse Bar

ESTIMATE FOR PAINTING FRONT OF BUILDING

Scrape, spot prime, caulk and paint 2 coat finish paint

Labor and materials

\$2640.00

Bellingen

2800.00

To: [Steve Rossi](#)

Subject: Town House Bar

Steve,

I have had an opportunity to run some numbers on sign options for the Town House based on our "approved consensus" of the last revisions. I plan to do the same type of dimensional sign that would tie in with the current wall sign on the front of the building with the addition of prismatic letters (see the ER Golf Course attachment) then step things down a bit on the back still keeping the functionality but "value engineering" them because they aren't "front entrance" signs.

Front Projecting Sign:

38x48" double faced HDU (wood grain) sign with prismatic cut lettering, v-carved EST and date **\$3667**
Custom steel fabricated bracket with anodized gold ball & hardware **\$396**
Double Gooseneck Lights (if desired) **\$445**

Back Projecting Sign

12x24" 1" painted PVC sign with HP vinyl Lettering **\$245**
24" stock ornate scroll bracket & hardware **\$165**

Back Wall Sign

32x96" tall painted 6mm ACM sign with HP Vinyl Lettering & Accents **\$786**

Delivery and Installation – All Signs **\$650**

Let me know what you guys decide. Thanks,

Alan Hubbard



PH: 231.421.5242

331 S. AIRPORT RD. • TRAVERSE CITY, MI 49686

LOCAL PROPERTY TAXES 2016 Summer

CITY OF CHARLEVOIX
210 STATE STREET
CHARLEVOIX, MI. 49720

15-052-265-003-00
TOWNHOUSE PARTNERS LLC
231 BRIDGE ST
CHARLEVOIX MI 49720-1400

TOTAL TAXES DUE IF PAID \$0.00
NO LATER THAN: 12/31/2016

After due date, additional fees will be added.
Please contact your local treasurer for the total amount due.

Check must clear or receipt is void.

TAXPAYER NOTE: Please notify us if name or address information is not correct. If additional information is needed to make the change, you will be contacted.

RETURN THE TOP PORTION WITH PAYMENT

LOCAL PROPERTY TAXES
2016 Summer

RECEIPT AVAILABLE ON REQUEST

PARCEL NUMBER: 15-052-265-003-00
PROPERTY ADDRESS: 231 BRIDGE ST
PROPERTY TYPE:
CLASS CODE: 201
SCHOOL: 15050

STATE EQUALIZED VALUE: 197,000
TAXABLE VALUE: 178,177
PRINCIPLE RESIDENCE EXEMPTION %: 0.0000

	TAXING AUTHORITY	TAX RATE	TAX AMOUNT
Assessment & Tax Information online at: www.charlevoixcounty.org Partial Legal Description: 231 BRIDGE ST DDA 1984 C1 LOT 3 OF GEORGE H HILLS SUBDIVISION OF LOTS 12, 13 & 14 OF BLK 6 OF ORIGINAL PLAT OF THE CITY OF CHARLEVOIX. COMPLETE LEGAL DESCRIPTION ON FILE CHARLEVOIX CITY TREASURER (231)547-3261 WWW.CITYOFCHARLEVOIX.ORG NOW ACCEPTING CREDIT CARDS FOR TAX PAYMENTS. (2.75% CONVENIENCE FEE FOR ALL CREDIT CARDS) JULY 1 - SEPT 1: TAXES ARE DUE TO THE CITY TREASURER. STARTING ON SEPTEMBER 2: 1% INTEREST PER MONTH WILL BE ADDED. ON MARCH 1, 2017 UNPAID REAL PROPERTY TAXES BECOME DELINQUENT. PLEASE CALL COUNTY TREASURER @ 1-800-548-9157 FISCAL YEARS County: 10/01 - 09/30 Twn/Cty: 04/01 - 03/31 School: 07/01 - 06/30 State: 10/01 - 09/30	STATE EDUCATION	6.00000	1,069.06
	COUNTY ALLOCATED	4.60000	819.61
	SCHOOL OPERATING	17.98380	3,204.29
	SCHOOL DEBT 11	1.71740	306.00
	SCHOOL DEBT 12	0.18060	32.17
	SCHOOL DEBT 15	0.26040	46.39
	CITY OPERATIONAL	9.05000	1,612.50
	INFRASTRUCTURE	2.04590	364.53
	REFUSE	1.00000	178.17
	DDA	1.36310	242.87
	TAX & SPECIAL ASSESSMENTS		7,875.59
	PREVIOUS PAYMENTS		7,875.59
	TOTAL TAX DUE BY: 12/31/16		0.00

MAKE CHECK PAYABLE TO:
CITY OF CHARLEVOIX
210 STATE STREET
CHARLEVOIX, MI. 49720

TREASURER NOT RESPONSIBLE FOR
PAYMENT ON WRONG PARCEL



Charlevoix Main Street Façade Incentive Grant Program Application

Applicant's Name: John murray Phone # 231-625-9905
Business Name 52 WEEKENDS
Property Owner's Name LSB VENTURES LLC
Project Address 227 Bridge St, Charlevoix, MI 49720
Parcel # 15-052-265-004-50
Mailing Address (Applicant) 203 Bridge St.
Charlevoix, MI 49720

The work to be performed in connection with the Charlevoix Main Street Façade Incentive Grant Program, for which the Applicant will be reimbursed, is outlined below:

Improvement(s) Planned (check whichever applies)

☐ Exterior brick or wall surface cleaning

☒ Pointing of brick/Mortar joint repair

☒ Patching and painting of façade walls

☐ Window and/or door replacement/repair

☐ Cornice repair and/or replacement

☐ Other (please specify) _____

Façade(s) Impacted (check whichever applies)

☒ Front ☒ Rear ☐ Side ☐ Corner lot

Total Cost of Improvement \$ 3,125

Incentive Amount Requested \$ 1,562.50

The following information must be submitted with your application to ensure quick processing:

1. Project Improvement Plans drawn to scale, if applicable

2. Samples of paint colors to be used in façade improvements
3. Photograph(s) of existing condition of property
4. Historic photo of building(s), which can be found in the archives of the Charlevoix Historical Society
5. Proposed budget and detailed cost estimates for work
6. Written permission by property owner, if tenant
7. Proof of payment of taxes (available at Charlevoix City Hall)
8. \$250 application fee (check payable to Charlevoix Main Street)
9. Proof of project funding

The Applicant certifies and agrees to the terms and conditions set forth below:

1. The Applicant is the owner or tenant of a property in the Charlevoix Main Street Façade Incentive Grant Program Target Area as outlined in the Charlevoix Main Street Façade Incentive Grant Program Guidelines Exhibit "A", hereinafter referred to as "Program Guidelines".
2. The Applicant is in good standing with the City of Charlevoix in terms of payment of taxes and utilities.
3. The Applicant agrees to be bound by the rules as outlined in the Façade Grant Incentive Program Guidelines and should consult the Downtown Charlevoix Design Guidelines (see Exhibit C) when making decisions regarding the aesthetic quality of the façade design.
4. All improvements to be undertaken will be consistent with all applicable zoning and building codes. Further, if review is necessary by the Charlevoix Planning Commission in accordance with the Charlevoix Zoning Ordinance, the review will be conducted before the work on the façade begins. Applicant must pay all relevant fees.
5. Only the work that is outlined on the application will be eligible for reimbursement.
6. The project must be completed within one year of approval of the application. There are no extensions of grant funds. The project is not eligible for reimbursement if the work is not completed during the approved time period.
7. Funds are awarded on a reimbursement basis. Disbursement of funds shall be made only after the entire project is complete and certified by City staff and the grant inspector to be in compliance with the approved design. The work must also adhere to any required inspections (e.g. Charlevoix County) before funds are disbursed for reimbursement. The Applicant must submit copies of invoices, receipts and an itemized statement of the total cost of the project, signed by the applicant. All documentation for payment must be provided at one time to Charlevoix Main Street for one payout, and the receipts must be provided no later than fifteen (15) months after the application has been approved. Payment will be made to the applicant by Charlevoix Main Street within 4-6 weeks. Charlevoix Main Street will only make checks payable to the Applicant. The amount of the reimbursement must adhere to the Program Guidelines. The specific amount is outlined in the application.
8. The Applicant understands that he/she is responsible for the construction management for the entire project.

9. The grant money awarded will be in keeping with the Façade Grant Incentive Program

Guidelines and shall not exceed the amount as outlined in the application.

10. It is expressly understood and agreed that the Applicant shall be solely responsible for all safety conditions and in compliance with all federal, state, and local safety conditions, safety regulations, building codes, ordinances and other applicable regulations.

11. The applicant shall, at his/her own expense, indemnify, protect, defend and hold harmless Charlevoix Main Street and/or its agent and employees, from all claims, damages, lawsuits, costs, and expenses, for any property damage, personal injury or other loss relating in any way to the Charlevoix Main Street Façade Incentive Grant Program.

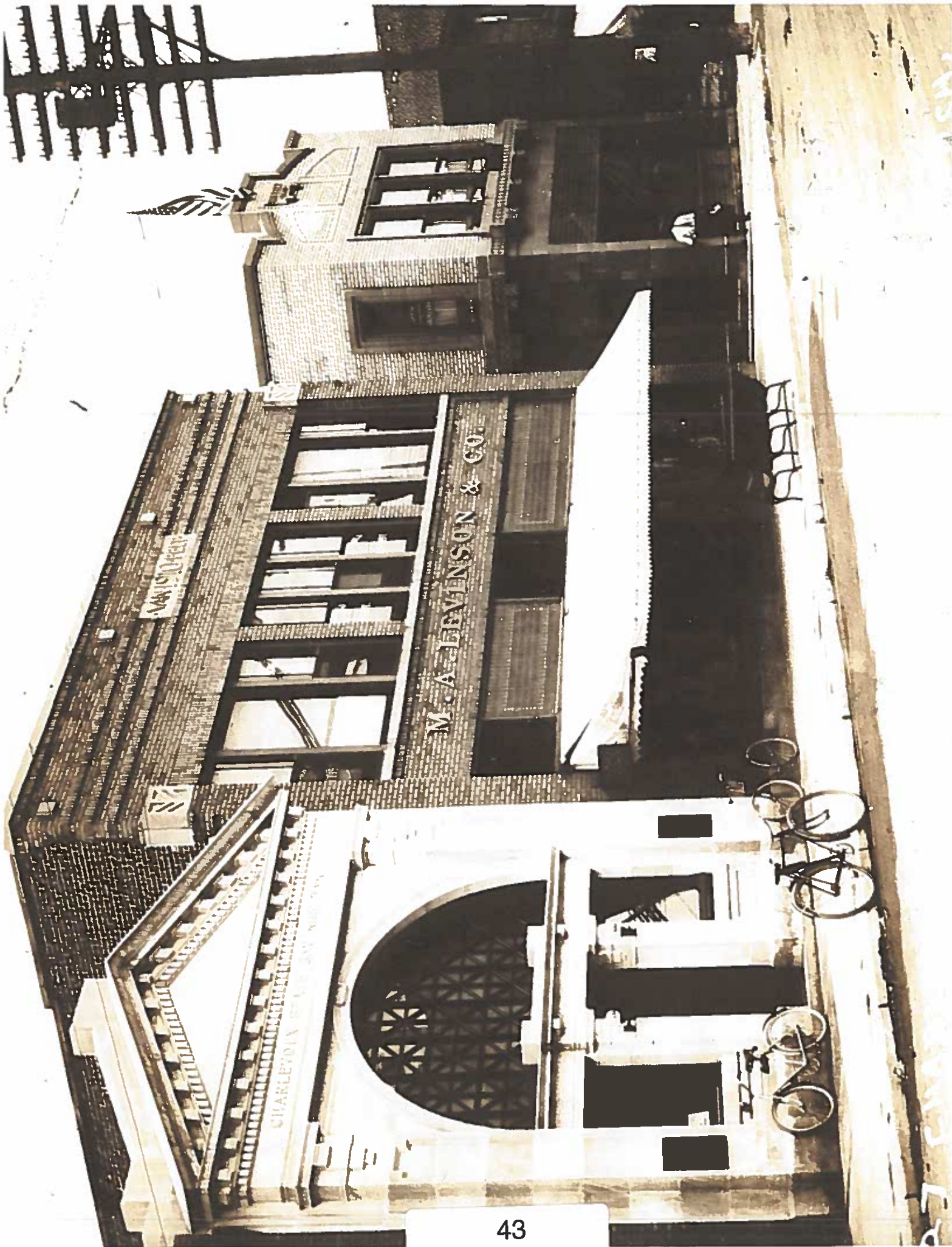
12. The Applicant understands that he/she is responsible for the maintenance of the façade improvements described here for a period of ten years from the project completion.

Applicant's Signature  Date 6-14-17
Property Owner's Signature  Date 6-14-17
Complete and return to: LSB VENTURES LLC.

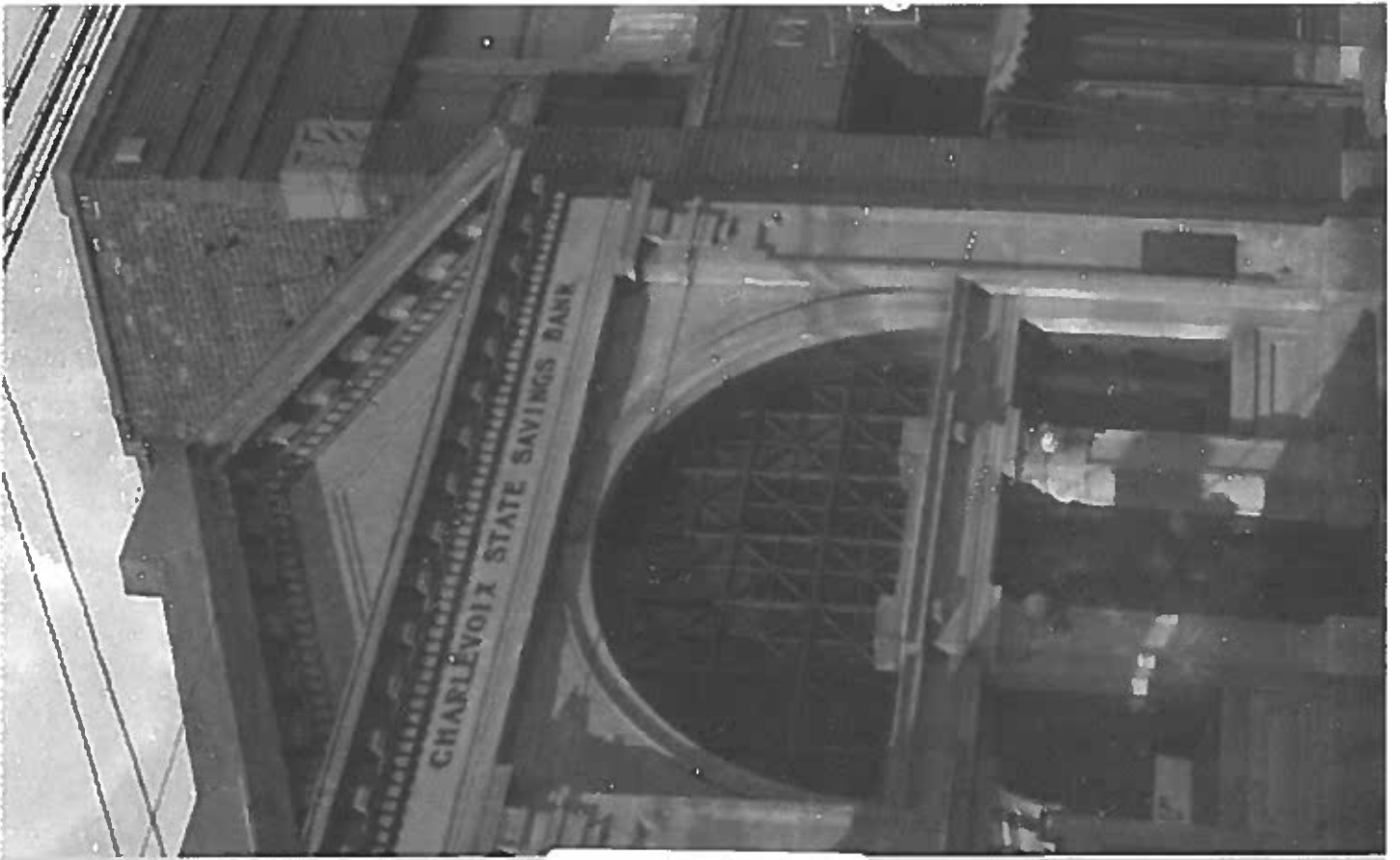
Charlevoix Main Street
210 State Street
Charlevoix, MI 49720
(231) 547-3257







Date Unknown





ESTIMATE

All-In-One Paint and Stain
3066 Black Road
Charlevoix, MI 49720
231-350-3601

Date May 24, 2017

TO 52 Weekends
John Murray

ITEM #	DESCRIPTION	QUANTITY
	Work to be done:	
	Scrape all areas where needed	
	Prime all areas where needed with oil based cover stain	
	Caulk all areas where needed with Big Stretch caulk to allow for movement	
	Apply two coats of Sherwin Williams Duration Satin to trim and walls of front of building	
	Scrape, sand and prime back of building	
	Apply two coats duration satin	
	Material and labor included	
		Total>>> \$3,125.00

Estimate is good for 30 days

50% due at start and 30% at half and 20% when finished

Please contact Tony Warchol at 231-350-3601 with any questions or comments.

Thank you for your business!

- Bellinger = 3600



"Quality Coatings since 1991"

Licensed and Insured • Painting • Staining
Decks • Drywall Work
Power Washing • Interior and Exterior
New Construction • Painting Maintenance

Proposal

May 25, 2017

Proposal # 52517227

227 Bridge St.
Charlevoix, MI 49720
Attn: John Murray

RE: Exterior Painting

We hereby propose to furnish all material and perform all labor for the completion of painting the exterior of the building at the above-mentioned location. This includes:

- Washing with a biodegradable house wash to clean and remove mildew.
- All necessary prep work such as caulking, removing loose paint and spot priming bare areas to assure a quality finish.
- One coat of Benjamin Moore exterior latex finish paint on all previously painted areas on the front and back of the building to match the existing colors.

Notes:

- Does not include windows that are factory finished.
- Includes finishing the ally-side block to match the existing color.
- Does not include areas on the roof which are not visible from below.

All Materials is guaranteed to be as specified and the above work to be performed and completed in a substantial workmanlike manner for the sum of:

Four Thousand Seven Hundred Sixty and 00/100.....Dollars (\$ 4,760.00)

With payments to be made as follows: 50 % to schedule with the remainder due upon completion of job.

Any alterations or deviation from above specifications involving extra costs will be executed only upon written orders and will become an extra charge over and above the estimate billed at \$ 35.00 per man-hour or by quote.

3 Guys Painting are licensed by the State of Michigan (License # 2104103781 and 2103187687) and has Liability and Worker's Compensation insurance coverage. Documentation of this will be submitted upon request.

Important Note: A residential maintenance and alteration contractor (Painter) in Michigan is required by law to be licensed under Article 24 of Act 299 of the Public Acts of 1980.

ACCEPTANCE OF PROPOSAL

The above price, specifications and conditions are satisfactory and are hereby accepted. You are authorized to do the work as specified. Payment will be made as outlined above. This proposal may be withdrawn if not accepted within 30 days.

Accepted _____ Date _____

LOCAL PROPERTY TAXES 2016 Summer

CITY OF CHARLEVOIX
210 STATE STREET
CHARLEVOIX, MI. 49720

15-052-265-004-50
LSB ENTERPRISES LLC
8534 KEMPER
CINCINNATI OH 45249

TOTAL TAXES DUE IF PAID \$0.00
NO LATER THAN: 12/31/2016

After due date, additional fees will be added.
Please contact your local treasurer for the total amount due.

Check must clear or receipt is void.

TAXPAYER NOTE: Please notify us if name or address information is not correct. If additional information is needed to make the change, you will be contacted.

RETURN THE TOP PORTION WITH PAYMENT

LOCAL PROPERTY TAXES
2016 Summer

RECEIPT AVAILABLE ON REQUEST

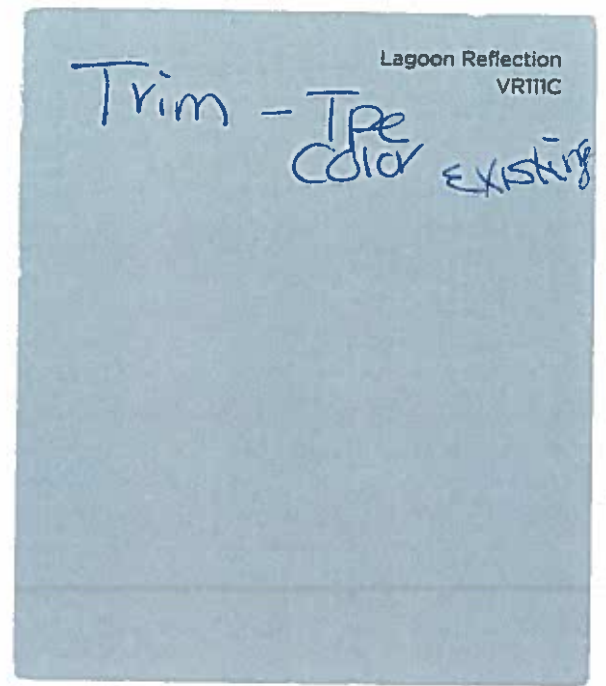
PARCEL NUMBER: 15-052-265-004-50
PROPERTY ADDRESS: 227 BRIDGE ST
PROPERTY TYPE:
CLASS CODE: 201
SCHOOL: 15050

STATE EQUALIZED VALUE: 140,100
TAXABLE VALUE: 107,101
PRINCIPLE RESIDENCE EXEMPTION #: 0.0000

		TAXING AUTHORITY	TAX RATE	TAX AMOUNT
Assessment & Tax Information online at: www.charlevoixcounty.org		STATE EDUCATION	6.00000	642.60
		COUNTY ALLOCATED	4.60000	492.66
		SCHOOL OPERATING	17.98380	1,926.08
		SCHOOL DEBT 11	1.71740	183.93
		SCHOOL DEBT 12	0.18060	19.34
		SCHOOL DEBT 15	0.26040	27.88
		CITY OPERATIONAL	9.05000	969.26
		INFRASTRUCTURE	2.04590	219.11
		REFUSE	1.00000	107.10
		DDA	1.36310	145.98
Partial Legal Description: DDA 1984 N 3 FT & 4 INCHES OF LOT 4 ALL OF LOT 5 OF HILL SUB BEING PT OF LOTS 12,13& 14 OF BLK 6 OF ORIGINAL PLAT OF CITY OF CX				
COMPLETE LEGAL DESCRIPTION ON FILE				
CHARLEVOIX CITY TREASURER (231)547-3261 WWW.CITYOFCHARLEVOIX.ORG NOW ACCEPTING CREDIT CARDS FOR TAX PAYMENTS. (2.75% CONVENIENCE FEE FOR ALL CREDIT CARDS) JULY 1 - SEPT 1: TAXES ARE DUE TO THE CITY TREASURER. STARTING ON SEPTEMBER 2: 1% INTEREST PER MONTH WILL BE ADDED. ON MARCH 1, 2017 UNPAID REAL PROPERTY TAXES BECOME DELINQUENT. PLEASE CALL COUNTY TREASURER @ 1-800-548-9157		TAX & SPECIAL ASSESSMENTS		4,733.94
		PREVIOUS PAYMENTS		4,733.94
		TOTAL TAX DUE BY: 12/31/16		0.00
FISCAL YEARS				
County:	10/01 - 09/30			
Twn/Cty:	04/01 - 03/31			
School:	07/01 - 06/30			
State:	10/01 - 09/30			
		MAKE CHECK PAYABLE TO: CITY OF CHARLEVOIX		

TREASURER NOT RESPONSIBLE FOR
PAYMENT ON WRONG PARCEL

MAKE CHECK PAYABLE TO:
CITY OF CHARLEVOIX
210 STATE STREET
CHARLEVOIX, MI. 49720



52 WEEKENDS
227 BRIDGE ST.

6/23/17

***CHARLEVOIX MAIN STREET
BOARD STRATEGY DEVELOPMENT
SERVICE REPORT SUMMARY AND
RECOMMENDATIONS***

Charlevoix Main Street Board Strategy Development Service Report and Recommendations

The following summary and recommendations reflect the results of the June 12th, 2017 strategy development process that was designed to build on the Transformation Strategy Development visit and presentation to Charlevoix Main Street (CMS) in March of 2017. In order to ensure the continued success of the Main Street model in revitalizing older and historic business districts, the National Main Street Center is introducing and implementing an updated community development framework, focused on outcomes as opposed to process. The goal being to make the Main Street Approach work better for those already using it, and make it more accessible for those not yet involved. The refreshed Main Street approach integrates three key components:

- **Community Vision** – informed by broad community engagement and solid market understanding
- **Community Transformation Strategies** – clear direction for revitalization implemented through the Four-Point Approach
- **Outcome Measurements & Impact** – demonstrate wise use of resources, progress and results

In collaboration with the National Main Street Center, Michigan Main Street collected and analyzed the most recent data available for the Charlevoix Main Street program. This data included: Online Community and Leaders Surveys, an analysis of Charlevoix' Place-Based Assets and the latest Market Study and Tapestry Segmentation.

As a result of these activities, four strategies were recommended for consideration;

Transformation Strategies (Short-term)

- Outdoor Recreation-Focused Tourism
- Health & Wellness/Healthy Living

Community Strategies (Long-term)

- Residential Development – Building More Density
- Entrepreneurship – New Business Development and Job Creation

After much deliberation, the board of CMS selected Health & Wellness as its transformation strategy, and Entrepreneurship as its community strategy.

The planning process delivered on June 12th was designed to expand the selected short-term transformation strategy into a defined vision, and to create goals and measures of success to move the organization toward achieving its vision. We also explored the long-term strategy of Entrepreneurial Ecosystems to help stimulate thinking about next steps.

The room was arranged so that groups of individuals were able to participate as part of the whole group, while also supporting small group reflection and dialogue. Group members introduced themselves and shared what they hoped to get from the session.

Members shared the following:

- Better understanding of the Refresh process
- What will the roles of the committees be?
- Goals and guidance for moving forward
- Consistent information to share with the community about the work of Charlevoix Main Street
- Clarity moving forward

The following was the agenda for this session:

- Refresh Overview
- Plan Design
- Transformation Strategy Processing
- Refining Goals
- Identifying Measures of Success
- Next Steps

The overview of the Refresh model stressed the need for a renewed focus on the alignment of goals and plans with its overall vision, collected community input and the city's Master Plan. These cascading goals are expected to inform the specific goals of Charlevoix Main Street and to increase awareness of how the part contributes to the whole; in other words, the goals and actions deployed by CMS will contribute to and/or support the overall goals of the community and of the city.

In the case of the Charlevoix Main Street, their selected long- and short-term transformation strategies align well with their overall “big” goals, and may help the program focus efforts that will accelerate achieving these goals:

1. Establish the foundation for a year-round economy by expanding shoulder season activity.
2. Bring businesses together to cooperate and coordinate resources to market downtown.
3. Establish the foundation for collaboration, partnerships, and communication.

Discussion on Entrepreneurial Ecosystems

The National Main Street Center describes entrepreneurial ecosystems in their brief, “Entrepreneurial Ecosystems and the Role of Commercial Districts”:

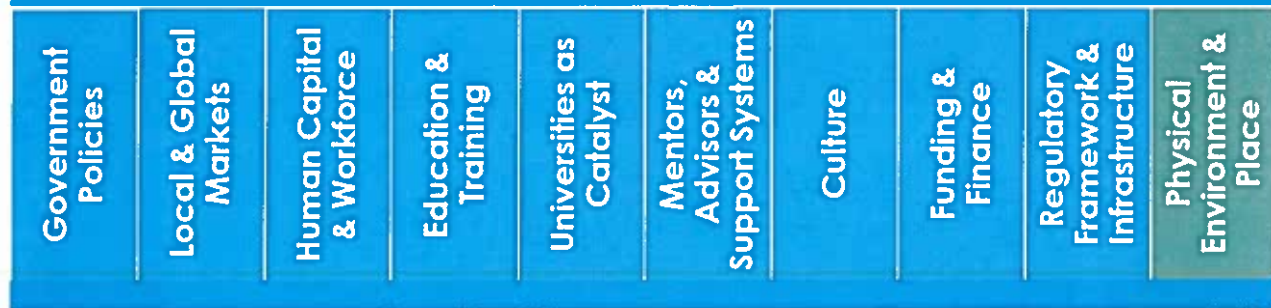
Entrepreneurial Ecosystem

Main Street America communities have long understood that supporting new and existing small businesses, and the entrepreneurs who run them, represents a vital aspect of the revitalization of downtowns and neighborhood business districts. These enterprises are the key to future prosperity, so it is imperative that commercial district leaders understand their importance and support their growth. New businesses, especially those owned and operated by Millennials, immigrants, and minority groups, will bring new ideas, innovation, excitement, and jobs to communities.

By most definitions, entrepreneurial ecosystems refer to the strategic alignment of a variety of public and private efforts—including government policies, funding and finance, human capital, and regulatory frameworks—to provide necessary financial, social, and human capital to foster entrepreneurship in

innovative and creative ways. Frequently overlooked in these definitions is the **value of place and the physical environment as central factors in creating and growing successful enterprises**. By emphasizing the creation and support of great places and spaces for people to live and work, commercial districts can attract new businesses and new ideas, thus contributing directly to the development of the local entrepreneurial ecosystem.

Entrepreneurial Ecosystem



The principle role in supporting and contributing to a community's entrepreneurial ecosystem is through its existing role of creating a sense of place. This is important for the following reasons:

- A distinct sense of place is the glue that holds any commercial district together
- Quality of place is a critical factor in attracting and retaining great entrepreneurial talent
- New forms of business, generational trends, and shopping preferences all point to the central role of place in entrepreneurs' location decisions

To help the group further explore Charlevoix's entrepreneurial ecosystem, we engaged in mapping its existing assets:

- Government Policies
 - Library
 - Business services
 - Marina
 - Safe, clean environment
 - Good schools
- Local & Global Markets
 - Multiple entities and attractions that draw customers to area
 - Marina
 - Library
 - Entertainment venues
 - Outdoor recreation; abundant natural resources
 - Local airport
 - Charlevoix as the county seat
- Culture
 - Growing base of young entrepreneurs
 - Multiple, locally-owned businesses
 - Dairy Grille
 - Farmer's Market
 - Incubator and Accelerator
 - Attraction

- Pop-up Markets
- Community Banks
- Chambers and other support organizations
- Easy transition from city to country spaces
- Infrastructure
 - Food
 - Healthcare
 - Airport
 - County seat/county services
 - Low real estate value/costs

Possible next steps were discussed including continuing to explore and learn more about entrepreneurial ecosystems, research “Bright Spots” – success stories from the field, request additional resources from NMSC and MMS.

Plan Design

The plan design was reviewed and reflected in the following graphic:



Transformation Strategy Processing

The session then moved to a reflection and discussion on the reasons why Health & Wellness/Healthy Living was selected as the transformation strategy, of those offered. These results follow:

Why “Health & Wellness/Healthy Living?”

- This strategy is perceived as unique
- Supported by data and a solid base from which to build
- Community leaders demonstrate a commitment to healthy living
- Existing resources to support this strategy; focuses awareness on existing strengths
- Attractive to young families who prioritize health
- Local college focus
- Is a growth industry; business development opportunities
- Attracts talent from a broad demographic
- Is a year-round strategy

Innovative Community Solutions

Allan Martin, President 810-241-1954
martin@mi-ics.com

Patrice Martin, Vice President 810-610-1649
patrice@mi-ics.com

Current State – Future State

We then explored the model of Current State-Future State. Ideally, your plan serves to transform the organization from its current reality to a desired future state. So, we begin our planning by assessing our current state to ensure that everyone is working from the same pool of information. Following this assessment, is an articulation of the desired future state, informed by the selected transformation strategy and describing the vision of what NMS hopes to create as a result of its work.

By keeping a clear view of the current reality and a well-defined and articulated vision before us, we create tension between the two. Tension, by its nature, seeks resolution. If we maintain a clear view for the future, the most natural resolution of this tension is for reality to move closer to that committed vision. The ultimate results may be different from (or less than) the original intent. But, extraordinary results can still happen. We learn that “It’s not what the vision is; it’s what the vision does.”

Current State

To begin our review of the current reality of Health & Wellness/Healthy Living in Downtown Charlevoix, we reviewed information from the NMSC Catalyst Strategy Brief for Health & Wellness:

Health & Wellness/Healthy Living

A Health and Wellness strategy pulls together retail, recreational, educational, and professional businesses (including social service organizations) and organizes them around improving people's well-being. Businesses like pharmacies, urgent care centers, and doctors' and dentists' offices are obvious components of this strategy. Others may include gyms, yoga studios, spas, organic grocers, smoothie shops, health-and-beauty-aid stores, and more.

A Health and Wellness cluster can sometimes already exist yet not be visible or obvious (even to revitalization leaders) because the individual businesses may not explicitly promote health and wellness. For example, health and wellness may be *inherent* in what a business does (as a dance studio), or an *aspect* of what a business does (as a restaurant with healthy choices highlighted on their menu). Pursuing a Health and Wellness strategy often involves consciously cultivating these aspects of the district, highlighting them to make them more visible, and expanding the range of offerings. More than some other strategies, Health and Wellness relies on marketing and promotion to make the cluster apparent.

Health & Wellness Potential Products/Services

- Acupuncturist
- Bakeries (e.g., those offering specialty products, like gluten-free)
- Dance studio
- Doctors and dentists
- Furniture for wellness (e.g., specialty desk chairs, mattresses, etc.)
- Grocery store (esp. with a focus on natural products)
- Gym
- Health and Beauty Aids stores
- Herbalist
- Hospital
- Juice bar
- Martial arts
- Massage therapist / studio
- Medical devices store
- Pharmacy

- Physical therapists
- Psychotherapists and counsellors
- Restaurants with a special health-conscious menu
- Spas
- Sporting equipment
- Urgent care
- Vegetarian restaurants
- Vitamin and supplement stores
- Yoga studio

To explore the current state, participants were asked to reflect on and discuss the current state of Health & Wellness/Healthy Living in the Charlevoix Main Street area, right now. The following are guiding questions used to frame the conversations:

- What exists right now?
- What do we know to be true?
- How do we know?

Results from this activity include the following:

Facilities/Physical Plant/Attractions

Community Pool
Mt. McSauba Ski Area
Beach facilities
City golf course
Splash pad
Recycling Center
Community garden
Farmer's Market
Munson Hospital
Fitness centers, yoga studio

Culture

Festivals and events
Workshops and classes
Access to recreation equipment
Top of Michigan Trails program
Wheelway trails
Strong messaging and programs targeted to youth
Local philanthropic support for health-related opportunities
Walking groups
Growing local farm-to-table

This discussion reinforced that the CMS has a strong, stable base from which to build.

Future State

The session next moved to an exploration of what achieving the transformation strategy will look like in and mean to Downtown Charlevoix in the near-term future, generally 3-5 years. This vision is not intended to be a "wish-list", but a defined vision.

The small groups were given 5-10 minutes to reflect on and discuss their answers to the following questions.

- What does successful implementation of the transformation strategy look like in downtown over 3-5 years?

- What do you need to see in downtown to achieve the transformation strategy? (e.g. increase, decrease, create, sustain...)
- What will be different?
- What will be the same?

Salad & Soup Shop

Desserts and baked goods

Specialty sit-down restaurant

Special event restaurant

BREWERY

No vacancies/all storefronts in use with a demand for more

Clean, attractive and beautiful downtown

Following review and discussion of the collected input on the future state, members were asked to reflect on the following questions. These were offered to guide the group to refine the above ideas into one, defined vision for their outdoor recreation strategy:

- What are some common themes?
- What resonates with you?
- What is inspiring and exciting?

Desired Future State

“Downtown Charlevoix is a beautiful, green, year-round community with a demonstrated commitment to the health and well-being of residents and visitors alike, and sustainable economic opportunities that invite active participation in all that Charlevoix has to offer.”

This statement articulates where Charlevoix Main Street seeks to be in the next 3-5 years. This vision will be used as a touchstone for setting goals, and as a filter through which to guide decision-making.

Defining Goals

Goals were then drafted based on the group’s desired future state, an understanding of their current reality and data from the handouts. These goals are intended to:

- ▶ Be broad and continuous over a 3-5-year time horizon
- ▶ Serve to guide decision-making
- ▶ Organize specific, annual activities that are focused on the defined vision/transformation strategy
- ▶ Are cross-cutting; committees or work groups each contribute to and/or support the larger goals
- ▶ Stimulate thinking about partnering organizations

Proposed Goals:

- 1) Create the physical layout and amenities, and sustaining resources that demonstrate Charlevoix’s commitment to year-round health & wellness/healthy living.
- 2) Develop a sustainable downtown that provides year-round economic opportunities to the greater Charlevoix community.

To help refine the goals, the group was asked to reflect on the following guiding questions:

- Will these goals move the organization toward its defined vision?
- Do they broadly define what you need to accomplish?
- Will they enhance a sense of place?
- Will they change the vibrancy and economic conditions within the community?

Next is to determine what measures of success are expected. Measures of Success serve to answer the question, “What happens if we accomplish the goal?” They assist in setting benchmarks that the organization will look for as it develops activities and deploys its project work plans. They are indicators of performance relative to the goals, help to track whether a particular strategy or approach is working, encourage and allow for adjustment and help to quantify the results expected of a particular goal.

Goals and Measures of Success:

- 1) Create the physical layout and amenities, and sustaining resources that demonstrate Charlevoix’s commitment to year-round health & wellness/healthy living.
 - a. Sustainable Built Environment Initiative (SBEI) map reflects this goal
 - b. Implementation of SBEI map
 - c. Increase in curbside recycling containers
 - d. # of recycling containers at Main Street events
 - e. Increase in number of people in downtown
- 2) Develop a sustainable downtown that provides year-round economic opportunities to the greater Charlevoix community.
 - a. Reduction in business turnover
 - b. Increase in # of health-related businesses
 - c. Increase in Area Median Income (over time)
 - d. % of increase in foot traffic, average transaction amounts, gross sales

It is expected that the following will occur next:

- I. Final report is provided summarizing:
 - a. How the transformation strategy aligns with the community vision and is specific and meaningful for the community
 - b. Recommended set of comprehensive goals defining how transformation strategy will be implemented to achieve community vision
 - c. Proposed measures of success for each goal
- II. MMS to hold follow-up call with Executive Director and Board Chair to discuss final report
- III. Community will formally approve/adopt report to move forward with 2018 work planning
- IV. Strategy Implementation + Project Management Session
 - a. This session, facilitated by Michigan Main Street Staff will set the framework for the organization’s 2018 work plans, incorporating the transformation strategy, goals and measures of success identified by the Board.
 - b. Board members and committee members will work together to identify current programming, programming other organizations are doing and potential programming that aligns with the transformation strategy and vision.
 - c. Board members and committee members will also identify potential partners that can help implement chosen transformation strategy and programming.

- d. Following this session, the organization will have identified programming to begin building work plans for implementation in 2018.

Attachments

.pdf of June 12th Strategy Development Session PowerPoint

Draft Transformation Strategy Development Plan

NMSC Brief – Entrepreneurial Ecosystems & The Role of Main Street

NMSC Catalyst Brief – Health & Wellness

Desired Future State: "Downtown Charlevoix is a beautiful, green, year-round community with a demonstrated commitment to the health and well-being of residents and visitors alike, and sustainable economic opportunities that invite active participation in all that Charlevoix has to offer."

Overarching Goals	Measures of Success	Possible Projects/Activities
Create the physical layout and amenities, and sustaining resources that demonstrate Charlevoix's commitment to year-round health & wellness/healthy living.	1. Sustainable Built Environment Initiative (SBEI) map reflects this goal 2. Implementation of SBEI map 3. Increase in curbside recycling containers 4. # of recycling containers at Main Street events 5. Increase in number of people in downtown	• Coordinate activities with SBEI • Coordinate with city to expand recycling program • Conduct pedestrian-friendly survey/study • Conduct cyclist-friendly survey/study • Incorporate Health & Wellness into branding • Cluster and promote existing Healthy Living opportunities • Targeted promotion of year-round opportunities • Expand safe and affordable housing options • Develop and implement plans to beautify "backside" of downtown
Develop a sustainable downtown that provides year-round economic opportunities to the greater Charlevoix community.	1. Reduction in business turnover 2. Increase in # of health-related businesses 3. Increase in Area Median Income (over time) 4. % of increase in foot traffic, average transaction amounts, gross sales	• Coordinate and expand on existing entrepreneurial assets • Explore development/redevelopment of mixed use spaces (commercial/residential) • Expand affordable live/work opportunities



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CREDIT: STEVEN MILLER

ENTREPRENEURIAL ECOSYSTEMS AND THE ROLE OF COMMERCIAL DISTRICTS



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The 21st century economy has dramatically influenced the way people do business, the way businesses differentiate themselves, and the way physical place and business intersect. We are experiencing a shift in demographics, consumer shopping and transitions within our local, regional, and national economies that are impacting the development and growth of entrepreneurs. These transformations have significant implications for downtowns and commercial districts. This guide is intended to help commercial district managers better understand the multi-faceted factors at play in supporting an entrepreneurial economy, demonstrate the role revitalization leaders have in helping entrepreneurs thrive, and position quality places as central to these efforts.

THE NEW FACE OF ENTREPRENEURSHIP

Small businesses and entrepreneurial enterprises have long played an important role in defining the fabric of our communities—helping to fuel local economies, providing unique experiences for consumers, and catalyzing innovation. Over the last decade, this sector of the economy has grown, with a correspondingly greater impact on downtowns and neighborhood commercial districts across the country. Two critical factors are converging that will continue to fuel both the transition and growing importance of entrepreneurship as part of a community's revitalization efforts: an increase in the percentage of the workforce employed by small businesses, and a shift in the demographic makeup of small business owners.

According to the Small Business Administration's Office of Advocacy, "small firms accounted for 60% of net new jobs since the end of the recession (mid-2009 to mid-2013)." Small businesses are defined as independently owned and having fewer than 500 employees. Almost 80% of small businesses are sole proprietorships, or businesses without employees.

And, according to the Pew Foundation, 10,000 baby boomers retire each day, a rate that will continue through 2019. As this boomer generation—which is disproportionately represented among small business owners—nears retirement age, there are significant implications for the small business landscape. Based on research by Bank of America, 11% of baby boomer business owners plan to simply dissolve their businesses, and many more have no succession plan in place. Thus, there is a critical need to develop a proactive entrepreneurship development agenda to set the stage for the future of America's Main Street economy.

Filling the small business gap is a boom in rates of entrepreneurship among women and minority groups. According to the most recent U.S. Census' Survey of Small Business Owners, women own 36% of all businesses, a jump of 30% over the previous five years. And, women are starting businesses at a rate of 1.5 times the national average. The rate of African-American women starting businesses was nearly seven times as high as their white counterparts, and the rate among Latina women was nearly nine times as high. And the largest generation, Millennials, are showing strong signs of entrepreneurial interests. Almost two-thirds (67%) said their goal involves starting their own business, according to a study from Bentley University.

THE DIFFERENCE PLACE MAKES

When most experts talk about entrepreneurial ecosystems, they're looking at the policies, structures, and approaches to investment that play a role in supporting new forms of economic activity and enterprise. While these factors are important, what's often missing in this dialogue is the importance of place. This guide will provide a framework for developing a place-based strategy to support entrepreneurship in your own commercial district. Key takeaways include:

- A distinct sense of place is the glue that holds any commercial district together.
- Quality of place is a critical factor in attracting and retaining great entrepreneurial talent.
- New forms of business, generational trends, and shopping preferences all point to the central role of place in entrepreneurs' location decisions.

IMPORTANCE OF ENTREPRENEURSHIP TO DISTRICT REVITALIZATION

Main Street America communities have long understood that supporting new and existing small businesses, and the entrepreneurs who run them, represents a vital aspect of the revitalization of downtowns and neighborhood business districts. These enterprises are the key to future prosperity, so it is imperative that commercial district leaders understand their importance and support their growth. New businesses, especially those owned and operated by Millennials, immigrants, and minority groups, will bring new ideas, innovation, excitement, and jobs to communities.

As communities experience this transition in entrepreneurship, there is a corresponding transition in the habits of consumers. The move away from regional shopping malls and sterile big box stores represents a profound shift towards a more bifurcated shopping pattern. On the one hand, shoppers are seeking convenience and lower price points, while there is also a growing desire and willingness to support more experiential and value-add consumer shopping. Acknowledging these changes, and catering to those needs, is critical for commercial district managers.

Given that need, how can commercial district managers maximize their position to take advantage of these conditions? While technical and financial assistance, along with entrepreneurial networks, are critical for the formation and growth of new businesses, a place-based entrepreneurial strategy is needed. **A truly robust local entrepreneurial ecosystem recognizes a location's physical environment as a critical factor for ensuring small business success.**

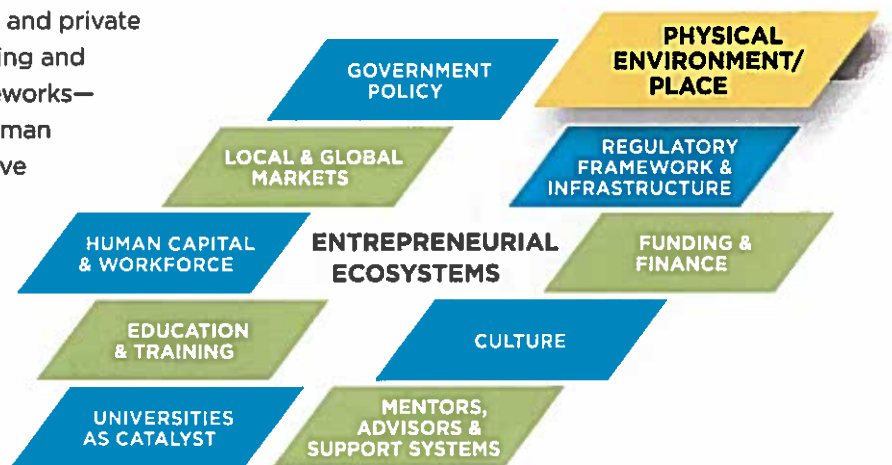
Putting "place" in a prominent position within an entrepreneurship strategy recognizes that historic business districts have the character, building stock, and walkable human scale that provides a competitive advantage within the marketplace and is conducive to the kind of personalized, experiential shopping desired by today's consumers.

WHAT IS AN ENTREPRENEURIAL ECOSYSTEM?

By most definitions, entrepreneurial ecosystems refer to the strategic alignment of a variety of public and private efforts—including government policies, funding and finance, human capital, and regulatory frameworks—to provide necessary financial, social, and human capital to foster entrepreneurship in innovative and creative ways. Frequently overlooked in these definitions is **the value of place and the physical environment as central factors in creating and growing successful enterprises.**

By emphasizing the creation and support of great places and spaces for people to live and work, commercial districts can attract new businesses and new ideas, thus contributing directly to the development of the local entrepreneurial ecosystem.

The graphic on this page illustrates the traditional "ingredients" that contribute to an entrepreneurial ecosystem, with a particular emphasis on place/physical environment.



THE ROLE OF MAIN STREET IN AN ENTREPRENEURIAL ECOSYSTEM

For today's savvy entrepreneurs, factors like the character of the space and place can have just as much weight in the decision of where to locate their business as traditional factors like taxes, utility costs, and rent. This makes the small scale of Main Street-type communities much more appealing. Places with strong character, historic building stock, and mixed-use development also tend to have more diversity in terms of business type, and have higher-density residential offerings—factors which in turn fuel a healthier entrepreneurial ecosystem. A recent study by Cushman/Wakefield of 500 businesses and entrepreneurs bolsters this conclusion:

- /// Talent attraction and retention is the most common reason why businesses ultimately made the decision to move to a downtown.
- /// Architecture also plays a role. Many respondents mentioned their desire for an open-office feel—converted warehouses and lofts impress potential workers. In addition, they take advantage of a surplus of underutilized buildings that convey local heritage.
- /// Entrepreneurs looked for locations in “live/work/play” neighborhoods, located near bars, restaurants and cafes.

References in this study to talent attraction and retention, the value of architecture, the reuse of historic buildings, and “live/work/play” communities all tie directly back to the principles that Main Street America programs have been using for decades to revitalize their downtowns. As a framework for commercial district revitalization that is rooted in improving local economic conditions and overall quality of life, the Main Street Approach is uniquely positioned to support a local entrepreneurial ecosystem. Much of the work of Main Street America programs is centered on cultivating quality spaces and places that provide a foundation for attracting new businesses, as well as creating great environments for employees to live and work. With an overall strategy to support entrepreneurs in hand, revitalization leaders can outline activities based in each of the Four Points. For instance:



ECONOMIC VITALITY By leveraging existing resources and creating new programs to fill gaps, districts demonstrate to entrepreneurs that they will be supported and have continued opportunities to grow and thrive.

DESIGN Communities that honor their architectural and natural resources, and create easy access to amenities will attract entrepreneurs who value unique spaces, multi-modal transportation, and available technology.

PROMOTION Spreading the word about available local resources can create buzz and generate interest with entrepreneurs looking for a place to start.

ORGANIZATION Developing new partnerships is key to leveraging collective resources, identifying roles, and connecting entrepreneurs.

ENTREPRENEURSHIP AND THE FOUR POINTS

The Main Street Approach provides a strong framework for districts to grow their entrepreneurial ecosystems. Each of the Four Points easily lends itself to this work. Some example strategies in each point include:

ECONOMIC VITALITY

- /// Offer technical assistance workshops in support of small business development
- /// Create incentives to drive targeted new entrepreneurial investments
- /// Develop a downtown incubator, accelerator, or innovation work center
- /// Leverage proximity to other entrepreneurship hubs
- /// Create a strategic downtown development plan with an entrepreneurship component
- /// Encourage cultural or distinctive businesses or institutions
- /// Launch pop-up showcases
- /// Recruit "Third Space" businesses

DESIGN

- /// Enhance the local digital infrastructure, including cell, fiber and Wi-Fi networks
- /// Be willing to drive innovative uses of space beyond retail, such as manufacturing
- /// Provide access to transportation alternatives (recreation trails, bike/hike paths, car shares)
- /// Create live/work spaces
- /// Place a greater focus on downtown housing on second floors and as part of infill developments



- /// Develop downtown clubs or networking activities for young professionals and entrepreneurs
- /// Create new partnerships with entrepreneurship stakeholders such as:
 - /// Small Business Development Centers
 - /// Local universities and community colleges
 - /// Tech groups
 - /// Young professional groups
 - /// Media to market new ventures
 - /// Developers

- /// Conduct events designed to promote, encourage and showcase entrepreneurship. Examples include pop-up retail and "Shark Tank" events
- /// Run feature articles on new entrepreneurs locating to your district
- /// Use of targeted entrepreneurship marketing materials that outline local ecosystem resources
- /// Create a downtown blog
- /// Run a social media contest for favorite, innovative or quirkiest district entrepreneur

ORGANIZATION

PROMOTION

LOCAL ENTREPRENEURIAL ECOSYSTEMS IN HARRISONBURG AND DETROIT: A CLOSER LOOK AT PLACE-BASED ECOSYSTEM DEVELOPMENT

While Harrisonburg, Virginia, and Detroit, Michigan, are two very different locales, they both illustrate the fundamental principle that “place” is a critical factor in the development of a vibrant local economy. The thriving downtown district in Harrisonburg is the driving force behind the town’s entrepreneurial renaissance, while the unparalleled sense of opportunity and critical need to generate new forms of enterprise in Detroit (detailed on the following page) have fueled new innovative approaches to small business support in that city.

A TECH HUB IN SHENANDOAH VALLEY (HARRISONBURG, VIRGINIA)

The town of Harrisonburg, Virginia, situated in the Shenandoah Valley and home to a large student and recent graduate population, is a prime example of how a local Main Street effort can contribute to a culture of entrepreneurship and innovation. In recent years, a cluster of tech start-ups has sprung up downtown, taking advantage of a wide range of incentives the community has developed, including tax incentives for eligible companies that locate in the downtown area.

With key partners like the Center for Entrepreneurship at James Madison University equipping students with the know-how to start their own enterprises, the local Small Business Development Center providing free training and resources to local businesses, and the Main Street America program Harrisonburg Downtown Renaissance (HDR) ensuring that the downtown district continues to draw residents and support growth, there is a community wide commitment to supporting a holistic ecosystem of entrepreneurship.



CREDIT: HARRISONBURG DOWNTOWN RENAISSANCE

While the results of coordinated efforts are impressive, Harrisonburg Downtown Renaissance knows the work is never truly done. Looking to the future, HDR is focused on ensuring that existing businesses continue to adopt new data-driven approaches to expand their customer base, helping them shift towards more experiential—not just transactional—modes of operating, and deepening engagement efforts to make sure that the mix of businesses and stakeholders in the entrepreneurship ecosystem reflects the diversity of the community.

Harrisonburg Downtown Renaissance received the Great American Main Street Award in 2014. [Watch their GAMS video here.](#)



HARRISONBURG
DOWNTOWN
RENAISSANCE

For more information, check out [Harrisonburg Downtown Renaissance's website](#).

LOCAL ENTREPRENEURIAL ECOSYSTEMS IN HARRISONBURG AND DETROIT: A CLOSER LOOK AT PLACE-BASED ECOSYSTEM DEVELOPMENT

MOTOR CITY MATCH (DETROIT, MICHIGAN)

Motor City Match is a unique entrepreneurship and real estate program in Detroit that pairs small business owners with the city's available vacant and under-used spaces, providing competitive grants, loans, training, and technical assistance to building owners and business owners. Motor City Match offers \$500,000 in resources each quarter.



CREDITS: MICHIGAN HISTORIC PRESERVATION NETWORK

To support the burgeoning entrepreneurial ecosystem in Detroit, all business owners who receive financial or technical assistance

through Motor City Match must open within one year of their awards and commit to staying in Detroit for at least two years. Building owners and business owners may use grants and loans to pay for building renovations, equipment, code compliance, working capital, and inventory.

Motor City Match's broad variety of funding sources demonstrates Detroit's commitment to creating and supporting an ecosystem of entrepreneurship. Several city departments, small business service providers, and community organizations are also part of the unified partnership to advance small business growth and corridor revitalization in Detroit, as well as the Department of Housing and Urban Development Community Development Block Grants (CDBG), and

six lending partners specifically committed to small business and construction loans: Detroit Development Fund, Invest Detroit, Detroit Microenterprise Fund, Capital Impact Partners, Detroit Local Initiatives Support Corporation (LISC) and the Michigan Women's Foundation.

Administered by the Economic Development Corporation of the City of Detroit (EDC) and staffed by the Detroit Economic Growth Corporation, Motor City Match offers two tracks: **the Building Owner Track for property owners looking for quality tenants to fill their vacant spaces**; and **the Business Owner Track for business owners looking to start or expand in Detroit**. Within each track, building owners and business owners apply for competitive financial and technical assistance to help them through renovation, build-out and startup.

For more information, check out www.motorcitymatch.com.





CATALYST STRATEGY BRIEF

HEALTH AND WELLNESS

The Main Street program helps communities rebuild and preserve economic vitality in their historic and older downtowns and neighborhood commercial centers. The Main Street Approach consists of three essential, tightly integrated tools:

1. **Community vision** that is informed by broad and inclusive community input *and* market understanding.
2. **Transformation Strategies** that incrementally create positive changes in the district's economy. These are implemented through simultaneous activity in four broad areas of work that, together, constitute the "Four Points." In brief:
 - **Design** encompasses improving all the physical and visual aspects of the district.
 - **Organization** involves cultivating partnerships and resources for the district.
 - **Promotion** is about marketing the district.
 - **Economic Vitality** focuses on capital, incentives, and other economic and financial tools for business and property development.

3. **Impact measurement** includes monitoring quantitative and qualitative outcomes.

A *Transformation Strategy* is a statement that guides a district's revitalization initiative and is based on a solid understanding of the district's economy and its position in the regional market. A *Catalyst Strategy* is an off-the-shelf Transformation Strategy. A Catalyst Strategy is generic, in that it can be adapted to a variety of places and circumstances – and it can be refined and customized over time. A Catalyst Strategy is a place to start, and the Four Points provide a framework for putting the strategies into action.

THE "HEALTH AND WELLNESS" STRATEGY IN A NUTSHELL

A Health and Wellness strategy pulls together retail, recreational, educational, and professional businesses (including social service organizations) and organizes them around improving people's wellbeing. Businesses like pharmacies, urgent care centers, and doctors' and dentists' offices are obvious components of this strategy. Others may include gyms, yoga studios, spas, organic grocers, smoothie shops, health-and-beauty-aid stores, and more.

A Health and Wellness cluster can sometimes already exist yet not be visible or obvious (even to revitalization leaders) because the individual businesses may not explicitly promote health and wellness. For example, health and wellness may be *inherent* in what a business does (as a dance studio), or an

aspect of what a business does (as a restaurant with healthy choices highlighted on their menu). Pursuing a Health and Wellness strategy often involves consciously cultivating these aspects of the district, highlighting them to make them more visible, and expanding the range of offerings. More than some other strategies, Health and Wellness relies on marketing and promotion to make the cluster apparent.

The Health and Wellness strategy is inherently diverse in its business mix, so business inventories will vary: A health and wellness district may be organized around a medical anchor (like a hospital); or it might center around relaxation, as in a spa or resort town. (Calistoga, California, for example, unites many of its downtown businesses – restaurants, bookstore, salons – around the town’s historic spas and their famous natural hot springs.) *Incompatible* businesses – especially if they form a large presence in the district – include unhealthy fast food chains, tanning salons, an excessive number of liquor stores, and the like.

There are many ways to tie in public-space amenities with this strategy, too: fitness parks, tennis courts, running trails, and even water bowls for dogs and benches for people – to encourage walking.

WHO ARE THE CUSTOMERS FOR THIS STRATEGY?

Customers for the Health and Wellness strategy can range from young families to senior citizens and from “medical tourists” to vacationers. In some cases, customers may be unaware of their own participation in a health-and-wellness pursuit, such as someone who enrolls in a martial arts class with the goal of learning self-defense.

Not all people identify themselves as interested in a health and wellness lifestyle: People who make healthy eating and healthy living part of their identity are often highly educated and more affluent. (Whole Foods, for example, is known for looking at educational achievement data when identifying potential store locations.) The customer profile for someone who participates in Health and Wellness strategy is less price-sensitive than most other strategies.

There may be cases where public health or actuarial data show you have an unhealthy local population (such as an area with high rates of obesity) and you want to improve overall community health – and shape the business district to support that effort. Be aware that getting someone to buy a product that doesn’t match their natural inclinations is harder to do than providing a product that they already want.

BENEFITS AND TRADE-OFFS

One of the great benefits of a Health and Wellness strategy is its ability to tie together diverse businesses, often by making subtle changes in business operations (e.g., by adding or adjusting some products or services). In order to make Health and Wellness a *driver* of your district’s economy (and more than a promotional tie-in), it needs at least a couple of businesses that are clearly linked to the strategy. This might include a fitness center or YMCA, or a hospital or other anchor business or institution. In communities where there is a large health-related economic anchor, Health and Wellness may be a central strategy. In other cases, it may be more appropriately used as a secondary strategy. A benefit of a well-developed Health and Wellness strategy is it has the potential to attract customers from a regional trade area – or, even, national or international visitors, if it offers a unique product.

On the trade-off side, a district tightly focused on health and wellness (whether medical or spa/resort) may not provide the variety of retail offerings to fulfill residents’ day-to-day needs.

IS THIS STRATEGY A GOOD FIT FOR YOUR DISTRICT?

The following questions are intended to help "take the temperature" of your commercial district. In order to answer them, you simply need to be familiar with your district and its environs. The questions are qualitative, and we want you to answer them in the context of what you already know. We are asking you to simply mark the scale in order to help you visualize whether your district is well-suited for pursuing a Health and Wellness strategy. Remember, this strategy is a starting point. As you do more research in the future, you can make it more nuanced and focused.

Knowing what you already know about your district, how would you rate it according to each of these characteristics?

COLD	HOT
← Starting a new market niche	Building on an existing niche or cluster →
← The potential market is relatively small	The potential market is relatively large →
← The district has many competitors in this	The district has few competitors in this →
← We would need new buildings/infrastructure	Our existing buildings/infrastructure are a good fit →
← Local population not well educated (e.g., some high school)	Local population very well educated (e.g., graduate degrees) →
← Target population not very interested in health and wellness	Target population actively engaged and interested in health and wellness →

If most of your scores fall into the right-hand side of the scoring boxes, this strategy is likely to be a good fit for your district. However, a low score for one or more of these characteristics does not necessarily mean that this strategy isn't an option for your district; it might simply mean that your organization and its partners might need to work a little harder to make this strategy succeed.

INFORMATION YOU'LL NEED FOR THIS STRATEGY

As mentioned earlier, the important thing about a Catalyst Strategy is to get started. Without undertaking a full market analysis, there are a few market research tasks you should begin now. These include:

- **Inventory:** You will need an inventory of all existing businesses in the district. Health and wellness-related businesses should be grouped, and you should create a tally of the approximate size of each strategy-related business (in square feet) and the number of people employed by each business.
- **Customers:** You should also assemble current information about the demographic characteristics of regional residents, particularly information about household income, age, household size, ethnicity, number of earners, and education levels (you can get this information from the US Census website and/or from third-party geospatial data providers like ESRI or Claritas). Conduct pedestrian and vehicular counts on major blocks or entry points in your district, at key times of day.
- **Competition:** Inventory and map competitive commercial centers in your region or trade area, including malls, shopping centers, and competing downtowns or commercial districts. Are other downtowns or commercial districts also trying to establish themselves as health and wellness destinations? Articulate how your Health and Wellness strategy is (or can be) differentiated from competing commercial areas. You should also articulate the threats posed by these competing areas.

- **Potential barriers:** Identify potential barriers to pursuing this strategy. These may include factors as varied as a misalignment of consumer preferences or a lack of geographic cohesiveness among contributing institutions and businesses.

TAKING THE NEXT STEP

Over the next year or two, after your Catalyst Strategy has begun taking root, you should plan to conduct additional research that can help you refine the strategy and adapt it more precisely to your district's particular circumstances. You may tackle some aspects of the market research on your own, or you may choose to engage professional assistance. Whichever route you choose, this additional research should help you answer questions like these:

- What are the boundaries of the primary trade area for this strategy? Are there other geographic areas that you should try to reach?
- Of the businesses that exist in your district that support the Health and Wellness strategy, how many square feet do they comprise, in total? What are their estimated total annual sales, including all selling channels?
- How much do households in the trade area spend on the types of retail goods and services related to Health and Wellness?
- What is the estimated regional sales void (or surplus)? If additional sales were captured, how many additional square feet of retail space (if any) could those sales support?
- What is the profile of the target customer? What are the profiles of secondary customers? How large is each customer segment, and approximately how much of each segment's spending do you think you can realistically capture in the future?
- What are the population trends in your area? Is the population aging? Are young families moving in?
- What are the nascent trends in this sector? What are the waning trends?

SAMPLE ACTIVITIES

There are many different activities that your organization and its partners might do to successfully implement this strategy. The activities you choose should address problems and opportunities that are specific to your district. Start with activities that are relatively easy, then gradually tackle more challenging ones. Be sure to include activities in all Four Points of the Main Street Approach; this is essential!

Depending how you have chosen to organize your Main Street initiative and the resources in your community, projects and activities may be carried out by a single committee, by staff specialists, by a consortium of partner organizations, or by some combination of these. (For more information, see the Technical Bulletin, "[Organizing Your Main Street to Transform Your Community]")

Here are some examples:

Sample Design activities:

- Install signs and markers to create walking and running trails in and around the commercial district.
- Install exercise equipment in a pocket park.

Sample Organization activities:

- Initiate a meeting of representatives of local health-related institutions or businesses to establish a partnership for the strategy.

Sample Promotion activities:

- Develop a brand identity that connects health and wellness to the district.

- Hold a health fair, with healthy cooking demonstrations, physical activities, and opportunities to get screened for blood pressure and other health indicators.
- Install parking signs that note number of steps to the center of district, making a challenge of parking farther away from one's destination, rather than closer.

Sample Economic Vitality activities:

- Work with restaurants to offer healthy options on their menus and help them to distribute the menus through other businesses that are part of the Health and Wellness cluster.
- Work with a local gym to run outdoor "boot camps" during warmer weather months.

POTENTIAL PRODUCTS AND SERVICES

Some businesses are inherently focused on health and wellness, but many other businesses can tie into the strategy by adapting their merchandising, services, or menus. This list is not exhaustive, but illustrates the range of businesses that can participate in the Health and Wellness strategy:

- | | |
|--|--|
| • Acupuncturist | • Martial arts |
| • Bakeries (e.g., those offering specialty products, like gluten-free) | • Massage therapist / studio |
| • Dance studio | • Medical devices store |
| • Doctors and dentists | • Pharmacy |
| • Furniture for wellness (e.g., specialty desk chairs, mattresses, etc.) | • Physical therapists |
| • Grocery store (esp. with a focus on natural products) | • Psychotherapists and counsellors |
| • Gym | • Restaurants with a special health-conscious menu |
| • Health and Beauty Aids stores | • Spas |
| • Herbalist | • Sporting equipment |
| • Hospital | • Urgent care |
| • Juice bar | • Vegetarian restaurants |
| | • Vitamin and supplement stores |
| | • Yoga studio |

MEASURING PROGRESS

The following tools can be used to track your success in implementing the strategy and in measuring its impact on the commercial district as a whole:

- Conduct on-street surveys when you implement this strategy – then, conduct surveys one year, three years, and five years later, asking the same questions. Are more people patronizing the district for its health-related businesses? Are their impressions and perceptions of the district improving?
Your surveys should include questions in four specific categories:
 - Attitudes and perceptions about the district
 - Current shopping habits
 - Additional products and services shoppers would like to be able to buy within the district
 - Demographic characteristics of those participating in the survey, including home zip code
- Track trends in the number of square feet of retail space devoted to health and wellness businesses.
- Ask the owners or managers of a representative sample of health-related businesses to keep an informal tally of foot traffic, average transaction amount, and gross sales. Interview the owners and managers at regular intervals and hold an annual focus group with them. Are the numbers increasing?
- Track the number of changes (in service offerings or product mix) that businesses have made to serve the health and wellness market.
- Choose several intersections or entry points in the district and count the number of people who walk by during 30 minute intervals. Do this at two or three key points in the day (e.g., morning, noon, and evening). Repeat the pedestrian counts at least twice a year, at the same times of day. Are the numbers increasing?