



AGENDA
CHARLEVOIX DOWNTOWN DEVELOPMENT AUTHORITY AND MAIN STREET MEETING
Monday, August 27, 2018- 5:30 PM
Council Chambers - 210 State Street, Charlevoix, MI 49720

- 1. Call to Order**
- 2. Pledge of Allegiance**
- 3. Roll Call**
- 4. Inquiry Regarding 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 - Regular Meeting - July 23, 2018
 - B. Minutes - Work Session - August 1, 2018
 - C. Committee Minutes
- 6. Reports**
 - A. Director's Report
Lindsey Dotson, Executive Director
- 7. Old Business**
 - A. Main Street Board Assessment
Lindsey Dotson, Executive Director
 - B. Logo Trademark & License Agreement Pricing
Lindsey Dotson, Executive Director
- 8. New Business**
 - A. Facade Grant Award Recommendation
Lindsey Dotson, Executive Director
- 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.

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.

DDA/Main Street Board
210 STATE STREET CHARLEVOIX , MICHIGAN 1 49720
Charlevoix Main Street DDA
(231) 547-3257 lindseyd@cityofcharlevoix.org

Consent Agenda

TITLE: Minutes - Regular Meeting - July 23, 2018

DATE: August 27, 2018

PRESENTED BY: Lindsey Dotson, Executive Director

ATTACHMENTS:

▣ 07.23.18 DDA Minutes - DRAFT

CITY OF CHARLEVOIX
DOWNTOWN DEVELOPMENT AUTHORITY / MAIN STREET MEETING
Monday, July 23, 2018 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, Fred DiMartino, Luther Kurtz, Carissa Mullaney, Maureen Owens, Amanda Wilkin
Members Absent: Rick Wertz
Non-Voting Member: Sean Bradley
City Staff: Lindsey Dotson, Executive Director

4. Inquiry into Potential Conflicts of Interest

5. Consent Agenda

- A. Regular Meeting Minutes – June 25, 2018
- B. Committee Minutes
- C. Monthly Reports – May & June

Motion by Member Mullaney, second by Member Christner to approve the Consent Agenda items as presented. Motion passed by unanimous voice vote.

6. Reports

A. Director's Report

Member Owens questioned how the registration was going for the *Practical Preservation Workshop* and Director Dotson replied that there were four attendees to the first session.

7. Old Business

8. New Business

A. Bylaws Provision – Charitable Gaming

Director Dotson stated that the Board needed to vote to amend the By-Laws to state that “we will remain a non-profit entity forever”.

Motion by Member Owens, second by Member Christner to amend the Charlevoix Downtown Development Authority *Bylaws of Authority* to include a provision indicating that the organization will remain nonprofit forever as requested by the State of Michigan Bureau of State Lottery. Motion passed by unanimous voice vote.

B. Main Street Board Assessment Tool

Director Dotson stated that a new board performance self-assessment tool was sent to them by Michigan Main Street and the purpose was to allow them to identify, based on the Board's input, the services that they will award to the DDA. She asked the members to complete the self-assessment and return it to her by August 16th.

C. Shuffleboard Court Donation

Director Dotson stated that a request was submitted by Todd Wyett for the DDA to consider the installation of two shuffleboard courts in Bridge Park which would be paid for by private donations. She stated that Mr. Wyett also proposed additional ideas. Mayor Kurtz suggested that they discuss each idea individually.

Director Dotson stated that at this point, none of the shuffleboard details have been worked out. Members discussed upkeep/maintenance, alternative locations, and the need for green space. It was noted that the Planning Commission was generally in favor of the idea but, suggested other locations. The Board agreed to have Director Dotson take this project idea to the Design Committee for vetting and recommendations.

Director Dotson stated that the second proposal was for flowers down the Channel inside the railings with a solar powered self-watering system. Discussion followed regarding the proposal including the upkeep/maintenance costs, the amount of wind that comes down the Channel, suggestion to talk to the *Keep Charlevoix Beautiful* group to get their input, possible fisherman concerns, whether volunteers would be available to help with the upkeep, lights along the Channel, and suggestion for a feasibility study to investigate the proposal more. The Board concurred to have Director Dotson contact Mr. Wyett to see if he was willing to fund some type of study regarding the costs, including installation and upkeep, and what would happen during the winter.

Director Dotson stated the third proposal was display large photos of Charlevoix on the lampposts downtown. She recalled that during their work planning and budget process, the Board turned down the idea of pole banners because of concerns about clutter downtown. The Design Committee was working on something similar to this which has been an ongoing project – high quality resolution photos to place in storefronts during the winter, or a historical plaque system. She felt that including Mr. Wyett in the Design Committee discussion would be helpful.

9. Public Comment

10. Request for Future Agenda Items

11. Board Comments

Chair Dipert stated there was some confusion regarding the 2018 Venetian donation. Director Dotson recalled that they donated \$1,200 to the Venetian Festival based on the DDA budget. Chair Dipert noted that the new policy allotted \$10,000 for donation purposes to support various events with the maximum donation being \$2,500, so he recommended that the DDA donate \$2,500 to the Venetian Festival. Director Dotson stated that the DDA also paid about \$1,000 for the movie and moving of the sound system for Venetian. She stated that the DDA gave Venetian \$1,500 as a sponsor this year. Discussion followed regarding sponsorships, in-kind contributions, and shadow season events. Member Wilkin asked that the Director remind Venetian of the in-kind contribution as well.

Motion by Member Owens, second by Member Christner to amend their contribution from \$1,500 to \$2,500 for the 2018 Venetian Festival. Motion passed by unanimous voice vote.

Member Owens announced that she will was unable to attend the next Board meeting.

12. Adjourn

Motion by Member Christner, second by Member DiMartino to adjourn the meeting. Motion passed by unanimous voice vote. Meeting adjourned at 5:25 p.m.

Joyce Golding/fgm

City Clerk

Kirby Dipert

Chair

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Consent Agenda

TITLE: Minutes - Work Session - August 1, 2018

DATE: August 27, 2018

PRESENTED BY: Lindsey Dotson, Executive Director

ATTACHMENTS:

- ▣ Work Session Minutes

Charlevoix Downtown Development Authority/Main Street Work Session Minutes

Wednesday, August 1, 2018 – 8:00 a.m.
210 State Street, Charlevoix City Hall, Charlevoix, MI

The meeting was called to order at 8:00 a.m. by Chair Kirby Dipert.

1. Roll call

Chair:	Kirby Dipert
Members Present:	Sean Bradley, Richard Christner, Maureen Owens, Amanda Wilkin
Members Absent:	Rick Wertz, Fred DiMartino, Luther Kurtz, Carissa Mullaney
City Staff:	Lindsey Dotson, Executive Director
Others Present:	Leigh Young - Organization Specialist with Michigan Main Street Center, Suzanne Perreault - Economic Vitality Business Specialist with Michigan Main Street Center, Ben Muldrow of Arnett, Muldrow & Associates, Denise Fate, Sarah Hagen, Bob Klein, Janet Kalbfell, Dennis Kusina, Katherine Bitely, John Duerr

2. Comprehensive Communication Planning Discussion

Ben Muldrow of Arnett, Muldrow & Associates led a workshop with the group that focused on creating a communications plan that successfully touches on the “Main 5” audience the Charlevoix Main Street DDA program needs to communicate with, including: Donors, Business/Property Owners, Public, Volunteers and Government. An elevator speech mad libs exercise was worked through and then discussion evolved around each audience to establish the following points:

- What is the value of Main Street?
- How can we share the value of Main Street?
- How can we measure our efforts?
- Who do we need to do a better job with?

The group then reviewed a sample “Main 5 Communication Map” and discussed how it could be used using different communication tools including social media,

paid print, earned media, press releases, presentations, website, and email or ad campaigns.

Leigh Young from the Michigan Main Street Center then told the group that she would work on compiling all of the discussion points and then share them in a completed document via email.

3. Adjourn.

Meeting adjourned at 11:00 a.m.

Lindsey J. Dotson Executive Director

Kirby Dipert

Chair

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Consent Agenda

TITLE: Committee Minutes

DATE: August 27, 2018

PRESENTED BY: Lindsey Dotson, Executive Director

ATTACHMENTS:

- ▣ Design Committee - August 2, 2018



Charlevoix Main Street Design Committee
Thursday, August 2, 2018
4:00 PM – City Hall Council Chambers
Minutes

Attendees: L. Dotson, J. Duerr, D. Fate, M. Owens, L. Keinath, G. DeMeyere, D. Miles, P. Glotzhober

Absent: R. Bergmann, H. Harrington, A. Munday, E. Selph, P. Weston

Denise announced that Hilary H. has stepped down from the committee, at least temporarily.

I. Approval of Minutes - The Minutes from the June 7, 2018, meeting which were sent out in advance via email were approved as written.

II. Outstanding Business

a. Main Street Design Assistance Program: Lindsey D. addressed the importance of planning, approach, and marketing of the program which is detailed in handouts provided with complete guidelines/steps from the “Michigan Main Street Design Assistance Program”. There are some action items for the committee to complete to adapt the program to fit our local needs. Luann, Maureen and Denise agreed to work on these and report back at our October meeting.

b. 2018 Work Plans:

i. Main Street Design Guidelines: We will be getting assistance from Jessica Flores from MI Main Street. Lindsey also found an older guideline document in the files which gives us a framework with which to work. Jessica be in attendance for our next meeting to discuss progress.

ii. Main Street Design Services: Ref. II.a. - the documents provided give us a good guide with which to work and develop our local program. A separate work plan will be prepared for this project.

iii. Street Tree Lights: Denise stated that August is the timeframe to assess the condition of the lights and the trees on which they are installed. She is going to get in touch with Don Swem to get his opinion and work out the inspection plan.

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- iv. Historic Signage: Lindsey reported that financial assistance is available from a private donor. Denise will convene the work group in the coming weeks to start planning the process and the project. John D. wants to work with the group.

III. New Business

a. Façade Grant Application Review: There was discussion on how to improve the guidelines and information submitted with the application to make them more complete and to facilitate review and evaluation, including as examples a project name and summary page and whether or not design services have been used.

i. Ron Way - True North: Phase 2 asking for \$7442.50 for windows, door, and siding. The funds were not approved. It was noted that the amount requested seemed to exceed the cost of the items listed for the work to be done, also there was no second bid for comparison purposes, and it appears that some of the work has actually been completed already on the building (windows). The overall project is recognized as a significant revitalization of the building.

ii. The Lodge - Earl Young Hotel: This is a major \$3.6 million re-construction project which is underway. \$10,000 was requested for cleaning of the exterior brick and brick/mortar pointing. Also the funds would contribute to new windows. While the project is applauded, allocation of funds for this request were not approved.

iii. The Bridge Street Inn - application not submitted.

iv. Rik Lobenerz - Simonsen Building: asking for \$6287.50 for exterior painting and mortar repair. The application was complete, follows the recommendation of MS Design Services and the plan is very executable. When scoring was reviewed this project rated the highest.

A motion was made by Gail D. and seconded to fully fund the Simonsen application from the \$10,000 in grant funds available and retain the balance for the 2nd round of applications due in December. It passed unanimously.

b. Potential new projects - ideas put forth and funding offered by Todd Wyett:

i. Shuffleboard courts - Potential location at Bridge Park or Hoop Skirt Alley. This would be a 2019 project. Concerns were expressed on how to manage players/play. Comprehensive planning needs to be addressed. Maureen O. is going to look what is available and potential costs to build or install these.

ii. Placing flowers along the channel on both sides - Careful planning needs to be addressed for this project; challenges include watering. Todd is suggesting a special solar-powered watering system.

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- IV. Call for Future Agenda/Research Items:** Reintroduce flowers on the side streets. Idea for the future for individuals to make donations with the possible concept of adopt a basket.
- V. Volunteer Hours** - reported.
- VI. Adjournment** - the meeting was adjourned at 5:15 PM.
- VII. Next meeting: Thursday, October 4, 4:00 PM at City Hall**

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Charlevoix Main Street DDA
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Reports

TITLE: Director's Report

DATE: August 27, 2018

PRESENTED BY: Lindsey Dotson, Executive Director

BACKGROUND:

Director Schedule

I have some upcoming planned absences:

- October 8 & 9th - Directors Retreat with Michigan Main Street *(Takes place at Shanty Creek Resort so I will save some money by not staying overnight. Training is free and two meals are provided.)*
- October 17 - 19th - Community Transformation Workshop - Chattanooga, TN *(The last "course" I need to take to obtain my Main Street America Revitalization Professional Certification through the Main Street America Institute. Registration is being paid for by Michigan Main Street saving us \$800. I will be carpooling with Boyne City & Grayling using Grayling's City Vehicle to save money too.)*

Main Street Pledges

A few years ago during the application process to become a Select Level Michigan Main Street program financial pledges were solicited to demonstrate community buy-in. Since then the Organization Committee has attempted to continue collecting the pledges (some of which were 5 year commitments) and also track money coming in. Throughout several staff changes since then along with a gap of the director position being filled the bookkeeping wasn't necessarily in the best shape. A lot of hours have been spent reviewing various databases and reports to update the information to see how much money was left to collect. After diligent research and much time, Organization Committee member John Kurtz compiled a list of people/companies who had pledged but hadn't donated in 2017 and also owed for 2018. A letter was written and reviewed by the committee and then sent to a select few. Of the people/companies that were on the list we knew there may be some discrepancies in our records and we were comfortable having conversations with these folks about their pledge and whether or not they still owed. The process did reveal a couple of mistakes in our records, which we are still working on getting updated. Letters did not go out to all pledgers yet, which still needs to happen. Some concern has been expressed about the letter by a Board member and how it was worded. I've attached it to my report for your review. This was reviewed by the Organization Committee before it was mailed, but of course none of us our donation solicitation experts. If anyone has a suggestion on how we can improve upon this process in the future please let me know. Thank you.

NLEA DDA Forum

Please see attached agenda for the upcoming DDA Forum in Elk Rapids on September 24th at 10am. If you'd like to attend with me please let me know. Maureen Owens went with me last year to one in Bellaire and it was interesting. It's always good to network with others in our region!

CEC Conference in Charlevoix - DDA Board Member Volunteers Needed

Andy Hayes of NLEA has requested that members from the DDA, City Council, Visit Charlevoix, and Chamber Board volunteer during the upcoming CEC Conference in Charlevoix on October 3rd & 4th, as it is

most beneficial to have local leaders present to help advocate for our town. They are requesting your help at the conference as a "session host" (simple 3 minute 'welcome to Charlevoix and introduce shop owner') and will need approx. 10 for each of our four program segments. Commitment is for one hour per session you do, as you also make sure the session ends on time. **Please let me know if you're interest in helping so that I can let Andy know at our next CEC Planning Committee meeting.** Thank you.

Main Street Update at City Council Meeting

City Manager Mark Heydlauff has requested that I present a short update to City Council during their October 15th meeting on programmatic updates from the past year and looking ahead a bit as we start to look at our 2018/9 budget. If you have any items you'd like me to cover please feel free to share. Also, if you'd like to attend your support is always appreciated!

Maestro Program

We subscribe to a Community Management program called Maestro to help keep track of important data pertinent to every aspect of my job. We've had volunteers helping with various aspects of data input including property and business info and now volunteers and work plans/tasks. This opens up the program to being used by multiple people involved with our organization. You should have received a couple of emails from me about this and an email from Maestro to prompt your username/password setup. As we go through this process I imagine there will be some kinks along the way, but be patient and we will work through them. I am considering conducting a brief training/demonstration during our next meeting to address any issues. I am also available to meet individually with people to answer questions. My hope that is we can all be comfortable using the program just in time for work planning so that our projects can be uploaded into this and keep us on task throughout 2019.

Downtown National Register Historic District Update

The Historic District Commission has drafted a letter to be sent to downtown property owners with buildings in the proposed downtown district (the 200 block and Van Pelt Alley) to obtain written support of the nomination. This has been a task needing to be completed for quite some time and thankfully I delegated it to them and we are ready to document support of moving forward. If anyone asks you about the letter (most should know about it by now) please refer to this website of FAQ's about National Register Historic Districts, thank you. <https://www.nps.gov/nr/faq.htm>

Strategy Implementation Webinar

The webinar is intended for Executive Directors, but also for Boards and Committee Members. Organization Specialist Leigh Young from Michigan Main Street will hold the webinar on **Monday September 17th from 2:00-3:30pm**. You can tune in from the comfort of your own home/office OR join me here at City Hall in the Council Chambers where I will project the webinar onto the big screen. **See instructions to connect below:**

Please join my meeting from your computer, tablet or smartphone.

<https://www.gotomeet.me/LeighY>

You can also dial in using your phone.

United States (Toll Free): 1 877 568 4106

United States: +1 (312) 757-3126

Access Code: 963-159-253

Audio Pin: Available upon joining meeting

First GoToMeeting? Let's do a quick system check:

<https://link.gotomeeting.com/system-check>

New Michigan Main Street/MEDC Staff

(from Laura Krizov) "*Two new Michigan Main Street staff members, Suzanne Perreault and Dana Kollewehr, have officially joined the MMS team and are available to assist your communities.*

*Suzanne will be serving as the **Economic Vitality Business Specialist** and will be working with existing downtown retail businesses to enhance their positioning, assist in marketing and sales training, provide education, entrepreneurial and direct one-on-one business support. She can be reached at perreaults@michigan.org or by phone at 517.643.0928.*

*Dana will be serving as the **Economic Development Specialist** and will be working with you and your communities on strategic use of space, downtown development/re-development, understanding your downtown market and business recruitment. She can be reach at kollewehrrd@michigan.org or by phone at 517.388.4829 (note this is Michelle Audette-Bauman's previous cell phone number)."*

Event Evaluation Toolkit

See attached documents for a copy of the recently completed/released event evaluation toolkit from the Michigan Main Street Center. This tool is meant to evaluate all components of an event to asses areas that need to be improved. While this toolkit can certainly help us out with our programming, I am open to sharing it with any event planning entity in town for use if they so desire. I think that it is important to look at our programming closely and with this tool we can continue to work on improving our events to their maximum potential. In the coming year I hope to use this tool to evaluate all of our events.

Data Resource Guide

See attached documents for a copy of the recently completed/released Data Resource Guide. The point of this document (and associated surveys/tools not included in attachment) were created to help programs track pertinent data about their district in order to effectively track progress. This was released along with a new version of our property/business inventory which was started while summer intern Andrew Reid was here. He worked on transferring all information we currently have into the new spreadsheet. Now an effort to collect missing info or make updates needs to be put forth. I hope that individuals from the Economic Vitality committee will be able to assist with this task, as it is a daunting one. The guide serves as a great resource to help simplify gathering said information. This will be an ongoing project for our program moving forward but I hope to get a lot more help with it this coming year.

Grant to Cover Wayfinding Signage

With the Charlevoix County Community Foundation grant deadline quickly approaching I am anticipating submitting an application to fund additional wayfinding signage. Prolmage is working on a "Phase 2" plan for me with pricing details so that the ask can be specific. Since the signs we could technically pay for are already up I hope this can be a way we can eventually complete the system of signage so that it all ties together and enhances the entire area. If this grant does not get awarded I will continue to seek out other funding opportunities so that we can finish this project.

Raffle License Update

The application and check have been submitted to Charitable Gaming for a raffle license to cover the Live, Life, Local event in November. As soon as we receive word I will update the interested parties.

Parking Study Update

Rob Bacigalupi, AICP Principal of Mission North, LLC has conducted two usage studies thus far this summer (one during the Art Fair & Boyne Thunder) and plans to return the week after Labor Day for two more. The two surveys that were distributed have gotten great response with 72 for the commuter survey and 233 for the visitor survey. The week of September 17th Rob will return to Charlevoix to attend the Business Owners Meeting, to talk to downtown employees, and present Mark and I with some recommendations. I don't have a final date yet

of when we will receive the completed Downtown Plan document but have met with Networks Northwest and seen an impressive outline. More updates will be given as I receive them!

Communications Plan

On August 1st board members and committee members participated in a work session with Ben Muldrow to develop a communications planning document. I have attached the final document for your review. This document will serve as a launching point and guidebook for external communication in the future focusing in on our 5 primary audiences and best ways to engage said audiences. The Organization & Promotion Committees are reviewing this document and will incorporate it into work plans for next year.

ATTACHMENTS:

- ▣ Sample Pledge Solicitation Letter
- ▣ DDA Forum Agenda
- ▣ Event Evaluation Self Assessment Tool
- ▣ Data Resource Guide
- ▣ Communications Plan



April 3, 2018

Business Name
111 Bridge Street
Charlevoix, MI 49720

Dear Mr. Kurtz:

Thank you for pledging to support Charlevoix Main Street upon our acceptance into the Michigan Main Street program in 2015. **Our records indicate that as of today you owe \$100 for your \$500 pledge to cover 2018.** We have an obligation to report to the Michigan Main Street program our progress on collecting pledges that were received with our application to become a Select Level Michigan Main Street Community. Because of your pledge we were accepted into this program which has benefited the downtown with several in-kind services from the state including:

- Free Design Services & Consultations by a Historic Architect for downtown building owners
- A market study update and business recruitment training
- Communications planning
- A consultant to assist with getting the City to be a Certified Local Government through the National Park Service

We could not have achieved so much over the past two years without your financial contributions. It is because of your pledge and your willingness to put a dollar amount to our efforts of revitalization that we are truly inspired and determined to see economic and quality of life improvements through the Charlevoix Main Street Program. Some recent highlights include:

- Launched a successful rebranding of Charlevoix through a strong partnership between City of Charlevoix, the Charlevoix Area Chamber of Commerce, and the Convention and Visitors Bureau. Developed a new brand adopted by the city, Main Street, and soon by the Convention and Visitor's Bureau. This also includes new logos for special events such as Live on the Lake Summer Concerts, Charlevoix Farmer's Market, and Charlevoix Restaurant Week.
- Implemented the first phase of a \$50,000 wayfinding signage project. Developed a plan for sign placement, content, and signage design.
- Expanded year-round downtown tree lights to include side streets and installed upgraded lights in the large spruce tree in East Park used for the annual holiday tree lighting and parade.
- Developed and introduced new façade grant incentive program funding the rehabilitation of seven storefronts in the downtown. The program provides a 50% reimbursement grant up to a maximum of \$10,000 per building. Main Street awarded over \$30,000 to these projects.

CHARLEVOIX MAIN STREET DDA | 210 STATE STREET | CHARLEVOIX, MI 49720 | CHARLEVOIXMAINSTREET.ORG



Design Services for 216 Bridge Street



CHARLEVOIX
MAIN STREET DDA

- Engaged high school students by creating the Junior Main Street committee who successfully launched the new mobile app, "Life in Charlevoix."



Downtown Investment Stats since 2015

Enclosed is a copy of your original Main Street pledge form and an envelope for submittal of your contribution. Please make checks payable to Charlevoix Main Street. We will also be emailing you with this information as well from lindseyd@charlevoixmi.gov.

If you would like to contribute in other ways, please consider becoming a volunteer. 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. Our volunteers are the lifeblood of the organization but our capacity could increase with your donated time. If interested, please call (231) 547-3257 for information on how to get involved.

Thank you for supporting Charlevoix Main Street and continuing to help us improve beautiful downtown Charlevoix.

Sincerely,

Lindsey J. Dotson
Main Street DDA Director
lindseyd@charlevoixmi.gov



Northwest Michigan DDA Forum

Meeting Agenda

September 24, 2018: 10:00am
Elk Rapids Government Center

- I. Welcome & Introductions
- II. Monthly Featured Presentation:
 - a. Launching into Form Based Code: *Joe Meyers, Interim Director of Economic Development, City of Ypsilanti* Joe will walk us through the City of Ypsilanti, MI's experience implementing Form Based Code
- III. Monthly Discussion Topic:
 - a. What design elements does your community have, and what does the municipality do to foster a unified look? What do we see as the pros and cons of having design elements?
- IV. Community Updates
- V. Adjournment

EVENT SNAPSHOT

EVENT NAME:

EVENT DATES:

[I.E. 2ND WEEKEND IN MAY; FIRST FRIDAYS SEPT. - NOV.]

YEAR ESTABLISHED:

ATTENDANCE:

[PAST 2 YEARS AVERAGE]

EVENT LOCATION:

[LIST SPECIFIC STREETS, BUILDINGS, PARKS, PARKING LOTS, ETC.]

TYPE OF EVENT:

- ☐ Community (General)
- ☐ Retail Event (Drive traffic to businesses)
- ☐ Revenue Generator (Income source for MS organization)
- ☐ Other _____

FINANCIAL SUMMARY:

Previous Year's Event
TOTAL REVENUE:

Previous Year's Event
TOTAL EXPENSES:

Previous Year's Event
NET PROFIT/LOSS:

VISION

What does it mean to have a vision for an event? A vision helps you stay laser focused with planning and implementation. Ultimately, your vision helps define your success and keeps organization staff, board members, and volunteers dedicated to proving the best possible experience.

A vision is a snapshot; a point in time during an event that you look around and describe what you see. Many communities have taken time to develop a vision for their downtown. Also consider how your event vision aligns with your Transformation Strategy. Write a vision (or transfer it here) for your event.

Describe what success looks like at a particular point in time with specifics so you'll know when you arrived.

EVENT VISION

IS YOUR VISION...

- Inspiring?
- Strategically Sound?
- Documented?
- Communicated?

RESOURCES

- Read a sample Event Vision in the Tool Kit
- Read "The Power of Visioning" by Ari Weinzwieg Zingerman's Co-Founding Partner:
<https://bit.ly/2CqdWiA>

Is your event meeting it's intended vision?

Take a minute to stand in the middle of your event while it's happening. Is your vision what you see happening around you? If not, it might be time to rethink your event. What improvements can be implemented into your Work Plan that will capture the essences of your event vision?

BEST
PRACTICE

EVENT FOUNDATION | EVENT EVALUATION

EVENT GOALS

List the top 3 goals that you hope to accomplish by implementing this event:

1. _____	2. _____	3. _____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

BEST PRACTICE

EVENT GOALS

Event goals should be measurable. Consider how your Transformation Strategy Measures of Success can be used to align with your event goals. Here are some ideas to help you establish goals for your event:

- Increase attendance by 10% from previous year
- Increase event profitability by 5% from previous year
- Receive 80% positive feedback from business community (measured via post event survey to businesses)
- Increase volunteer participation by 5% from previous year
- Gather 250 new attendee names & addresses (obtained through enter to win / sign up)
- Reduce staff hours spent on event by 5% from previous year
- Reach 1,000+ people interested in the event on Facebook
- Reach 1,000,000 impressions of event marketing material through comprehensive advertising plan (number of eyes on event logo, ads, social media, etc.)
- Bring in one new sponsor at \$500
- See a 100% renewal of current sponsors
- See a 25% uptick in downtown business revenue during the event

BEST PRACTICE

What do we do if we're not meeting our goals?

If your event is not reaching it's goals, take time to discuss why. Does the reason fall within something you can control? Were the goals realistic and attainable to begin with? Keep in mind what you can control and what you can't.

- **CAN CHANGE** - your volunteer recruitment efforts, soliciting additional vendors, researching quality of entertainment, marketing and advertising spending, etc.
- **CAN'T CHANGE** - the weather,

BEST PRACTICE

When do we discontinue an event?

- If your event does not align with your Transformation Strategy, it's time to rethink your event.
- If you are consistently not meeting your event goals, it's time to rethink your event. New events will take up to three years to get off the ground. Give your event time to grow and gain momentum. If it is still not meeting goals after 3 years, it's time to drop it and put your efforts into something that better aligns with the needs to your community.

COMMUNITY PERCEPTION

Rank each stakeholder group based on where you perceive their attitude towards the event lies. You may select more than one option for each stakeholder group.

	Loves it	Sees it as a community tradition	Likes it	Neutral	Does not like it	Sees it as annoyance	Doesn't know about it
Main Street Board	☐	☐	☐	☐	☐	☐	☐
Downtown Retailers & Restaurants	☐	☐	☐	☐	☐	☐	☐
Downtown Service Businesses	☐	☐	☐	☐	☐	☐	☐
Visitors / Event Attendees	☐	☐	☐	☐	☐	☐	☐
Community Members at Large	☐	☐	☐	☐	☐	☐	☐
Downtown Residents	☐	☐	☐	☐	☐	☐	☐
City / Police / Fire / Public Works	☐	☐	☐	☐	☐	☐	☐
Event Volunteers	☐	☐	☐	☐	☐	☐	☐
Other:	☐	☐	☐	☐	☐	☐	☐
Other:	☐	☐	☐	☐	☐	☐	☐

BEST PRACTICE

Community Perceptions

HOW TO:

Why they matter?

You want to spend time organizing and implementing your event, not putting out fires set by people working against your efforts. Gaining community support as a whole from all stakeholders is a key to running a successful event.

What to do with positive perceptions

- Use the community support to share the story of the event including why people come and what they love about it
- Engage those that love the event to help with planning and as task volunteers
- Ask your supporter to speak publicly about the event and the impact it has had on them - this can be especially helpful when asking for event approval in front of a City Council

How to change negative perceptions

- Ask and be open to hearing what it is they don't like about the event. It may be something easy to change. Often times stakeholders can feel "out of the loop" and that casts a negative feeling about the event. Overcome that by communicating with all stakeholder groups.
- Engage those stakeholders with negative perceptions to help make improvements and implement changes to the event.

WORK PLANNING

Work plans serve as a well documented task list of all tasks that guides the implementation of an event. It is a tool that is used by the MS Organization's Board & volunteers to carry out the event's activities.

Does your event have an event champion / project lead?

[Should not be MS Executive Director]

☐ Yes

☐ No

Who? _____

Do you operate your event using a work plan?

☐ Yes

☐ No

List the following items identified in your work plan:

☐ Project title

☐ Brief Description

☐ Objective

☐ Measures of success (Event Goals)

☐ Main Street Point

☐ Main Street Point Overlap

☐ Transformation Strategy Goal

☐ Transformation Strategy Goal Overlap

☐ Committee/ Team Chair

☐ Projected Revenue & Expenses

☐ Actual Expenses / Revenue

☐ A robust list of event tasks

☐ A lead volunteer for each task

☐ Due date / Completion dates for each task

☐ Projected cost / income for each task

☐ Actual cost / income for each task

☐ Potential partners for each task

☐ Current status of each task

Does your event align with your Transformation Strategy?

☐ Yes

☐ No

LOGISTICS

This section measures the effectiveness of the coordination and implementation of tasks that occur from set up to tear down of the event.

EVENT SET-UP:

How long does it take to set up the event? _____

Number of volunteers needed: _____

List 3rd party vendors that you need to coordinate set up with:

(AV, Food & Bev., Tents, Tables, Chairs, Linens, Portable Restrooms, Waste management, Etc.)

List City departments that you need to coordinate event set up with:

(Street Closures, Snow Removal, Electrical, Water Hook-up, Etc.):

For vendor based events, do booth spaces need to be marked?

☐ Yes ☐ No

Is a final event walk-through necessary?

☐ Yes With Who? _____
☐ No

INFORMATION AREA:

This is typically manned by staff and volunteers and serves as the central hub for all things related to the event.

Mark if the following items are true about your event information area:

- ☐ Is manned with a staff or volunteer at all times when the event is open
- ☐ Has informed staff or volunteers to answer all questions
- ☐ Has a process in place to document all comments and concerns
- ☐ Is utilizing area to capture patron information (i.e. Enter to win)
- ☐ Has a first-aid kit
- ☐ Has a fire extinguisher
- ☐ Is centrally located and visible
- ☐ Has information about MS Organization and ways to get involved

STAFF SCHEDULE & DUTIES

Is the MS Executive Director present during all hours of the event? Set up? Tear down?

☐ Yes ☐ No

Does the MS Executive Director have specific duties to perform during the event? (i.e. sell tickets)

☐ Yes ☐ No

LOGISTICS

BEST PRACTICE

As the main point of contact for the event, the event director (MS Executive Director) should not be tied down to a specific task that could be managed by a volunteer. Often times issues arise that need to be solved immediately and if the Main Street Executive Director is committed to a specific task it is difficult to leave that and solve the issue.

PERSONAL CONNECTION:

Are there edible amenities offered to volunteers, exhibitors, or other behind the scenes people during the event?

[This may include coffee and donuts before the event begins or pizza offered during set up, etc.]

☐

Yes

☐

No

Does the MS Executive Director personally thank everyone involved in the event before it ends?

☐

Yes

☐

No

Does a MS Board Member personally thank everyone involved in the event before it ends?

☐

Yes

☐

No

Are all event participants (such as exhibitors) welcomed each day by event staff?

☐

Yes

☐

No

BEST PRACTICE

PERSONAL CONNECTION

One thing that often sets an event above the rest is the friendliness and personal connection from the event team. There are many ways to connect with event participants - including vendors, exhibitors, volunteers, musicians, and others. Consider the following ideas:

- Offer coffee and donuts to exhibitors or volunteers before the event opens.
- Offer pizza and pop during set up.
- Leave a thank you note in exhibitors booths with candy or a small snack
- Walk around in the last hour of the event and personally thank every vendor for being there
- Have an area where exhibitors can grab a bottled water or snack
- As the event wraps up, pop into businesses and thank them for staying open during the event.
- Invite any municipal departments who provided event support (like police, public works, etc.) to receive the same thank yous as volunteers / exhibitors.

BEST PRACTICE

TAKE A PAGE OUT OF OLD TOWN LANSING'S BOOK

Old Town Lansing coordinates a specific volunteer team, made up of Board Members and other Organization leaders whose only job is to thank event volunteers. This concept could also be extended to thanking sponsors, businesses who supported the event (even if it was just by being open), and municipal departments. This provides an excellent opportunity to gather verbal feedback as well!

LOGISTICS

TEAR DOWN

How long does it take to tear down the event? _____

How many volunteers are needed to tear down the event? _____

Do you have policies / rules in place for exhibitors who tear down early?

☐

Yes

☐

No

RESOURCES

Find in the Tool Kit

- Vendor Manual

[Shows an example of policies / rules on exhibitor set up & tear down]

BEST PRACTICE

HOW LONG SHOULD EVENT SET UP & TEAR DOWN TAKE?

That depends. Every event will likely vary in set up and tear down times. A major factor being not only the type of event you are producing but the number of volunteers you have to help. Establish a benchmark on how long it takes to complete set up and tear down tasks and then set a measurable goal for the following year such as reduce tear down time by one hour. As you put together next year's work plan, be sure to identify what you will need to do to meet that goal such as solicit 3 more volunteers to help with tear down.

VENDOR-BASED EVENTS

- Allow for a 6-8 hour window for exhibitors to set up. Some will need longer than others and not everyone can come at the same time. This helps eliminate congestion during set up as well.
- Exhibitor tear down usually lasts about 2-3 hours depending on how much inventory needs to be repacked and the elaborateness of their displays. At the end of an event, people want to go home and are fairly efficient at tear down.

BEST PRACTICE

EVENT LOGISTICS TIES INTO WORK PLANNING

Include a detailed section within your work plan that identifies all set up and tear down tasks. Assign a volunteer or Board member to those duties ahead of time, through the work planning process.

VOLUNTEERS

Community engagement is a vital component in the Main Street Approach. One way to engage community members is by inviting them to participate as a volunteer. The MS Organization's event work plan will identify what tasks need to be completed by volunteers and the Organization can then recruit volunteers based on those needs.

TOTAL NUMBER OF VOLUNTEERS:

TOTAL NUMBER OF VOLUNTEER HOURS:

AVERAGE NUMBER OF HOURS EACH
VOLUNTEER WORKS:

VOLUNTEER NEED				COMPARED TO STAFF TIME
TASK	# OF VOL. NEEDED	ACTUAL # OF VOL.		# OF STAFF HOURS NEEDED
Planning Committee Members	_____	_____	•	_____
			•	
			•	
			•	
Pre-Event Tasks	_____	_____	•	_____
			•	
			•	
Event Set Up	_____	_____	•	_____
			•	
			•	
Day-Of Activities	_____	_____	•	_____
	</			

VOLUNTEERS

TRACKING STAFF TIME

MS Board members should be aware of the total time spent by MS staff to produce an event. Often times events can be draining on the MS Executive Director which can lead to turn over. Below MS Executive Directors should estimate their total hours spent on planning & implementing the event.

MS Executive Director's Time	Total # of Hours:
Attending planning meetings:	_____
Completing pre-event tasks:	_____
Event set-up tasks:	_____
Hours work during the event:	_____
Event tear-down tasks:	_____
Completing post-event tasks:	_____
TOTAL HOURS:	_____
HOURLY RATE: (Inclusive of wage + benefits)	x _____
TOTAL COST:	_____

DO YOU HAVE ENOUGH VOLUNTEERS TO SUCCESSFULLY PLAN EVENT?

TASK	Did not have enough	Had enough to be effective	Had sufficient volunteers
Planning Committee Members	(1)	(2)	(3)
Pre-Event Tasks	(1)	(2)	(3)
Event Set Up	(1)	(2)	(3)
Day-Of Activities	(1)	(2)	(3)
Tear Down	(1)	(2)	(3)
Post Event Tasks	(1)	(2)	(3)

WHO MAKES UP YOUR VOLUNTEERS? [Indicate # of volunteers, for each sector.]

_____ Board Members	_____ Students
_____ City Staff	_____ Other Stakeholders
_____ Business Owners and/or Staff	_____ Other _____
_____ Local Residents	

HOW LONG HAVE YOUR VOLUNTEERS BEEN VOLUNTEERING FOR YOUR EVENT? [Indicate # of volunteers, for each # of years.]

_____ First Time Volunteer	_____ 4 - 5 Years
_____ 2 - 3 Years	_____ 5+ Years

VOLUNTEERS

Volunteer turnover can occur when volunteers don't return to help the following year. Where does volunteer turn-over fall for your event? [Circle Range]

LOW

MEDIUM

HIGH

HOW TO

STRATEGIES TO ADDRESS VOLUNTEER TURNOVER

- Set up a structure. Ensure that volunteers know what to expect and what is expected.
- Do your best to incorporate volunteer ideas into your work plan and as part of the implementation. There is nothing worse then providing input only to have it be ignored.
- Make sure you take time to recognize volunteers. Thank them regularly for their time and contribution.

VOLUNTEER COMMUNICATION

How do you promote event volunteer opportunities?

- ☐ Website
 ☐ Social Media Post
 ☐ Word of Mouth
☐ Email
 ☐ Personal Invitation
 ☐ Other _____

Do you have clear expectations for volunteers such as a written job description?

- ☐ Yes
 ☐ No

Are volunteers reminded of volunteer shifts and duties prior to the event?

- ☐ Yes, via email
 ☐ Yes, Verbally
 ☐ Yes, via phone call
☐ No

Do you ask for volunteer feedback? (Such as Post-Event Survey)

- ☐ Yes
 ☐ No

VOLUNTEERS

HOW ARE VOLUNTEERS

APPRECIATED: [Check all that apply.]

- ☐ Verbal Thank You
- ☐ Handwritten Thank You
- ☐ Certificate
- ☐ Special Recognition such as at Board Meeting, Vol. Appreciation Party, Social Media
- ☐ Hospitality Perks (such as snacks, meals, free tickets, etc.)
- ☐ Other _____

DO VOLUNTEERS FEEL WELL UTILIZED?

[Ask them. Use a post event survey to engage volunteers.]

- ☐ Yes
- ☐ No

STRATEGIES TO SOLICIT NEW VOLUNTEERS:

BEST PRACTICE

- Have something specific (and fun) that you want a volunteer to do
- Have a set start time and end time
- Offer hospitality benefits such as free tickets if they work so many hours
- Ask your current volunteers for the name of one person they think might be interested and personally follow up with that person
- Post about opportunities on social media
- Create a lead form* (and distribute via email or have on website) and personally follow up with interested volunteers
- Create a brief volunteer application to gather basic information as well as other experience, skill set, and interests
- Create volunteer job descriptions outlining commitment requirements
- Have documents available on MS website

*A lead form let's people show their interest by filling out a form with their information (name and phone &/or email) and allowing the MS Organization to follow up with them.

VOLUNTEER MANAGEMENT

Manage your volunteer base with these best practices:

- Utilize a volunteer application to capture volunteers information and match their skills to the needs of the MS Organization
- Have volunteer job descriptions available that establish clear expectations
- Utilize a CRM tool or Excel file as your volunteer data base and to track your volunteers

BEST PRACTICE

RESOURCES

Check the Tool Kit for the following:

- Volunteer Job Description
- Volunteer Tracking Sheet

BRANDING

Branding is the visual images that represent the event in marketing, advertising, and throughout the event. It is a crucial part of the event foundation.

When was the event branding established?

- ☐ When the event was created
- ☐ It changes year to year
- ☐ It was recently updated / refreshed
- ☐ Other _____

Is your event brand consistent with your Main Street organization's branding?

- ☐ Yes
- ☐ No
- ☐ Unsure

GRADE YOUR BRANDING

On a scale of 1 - 5, please rank the following in regards to your event branding:

Not Satisfactory	Average	Good	Very Good	Excellent
(1)	(2)	(3)	(4)	(5)

ATTRACTIVENESS & PROFESSIONALISM OF BRAND

[Is the brand attractive & professional?]

(1)	(2)	(3)	(4)	(5)
-----	-----	-----	-----	-----

COHESIVENESS BETWEEN MARKETING PLATFORMS

[Is the brand consistently used across all marketing platforms from logo to print material, digital to event signage? Are style guide elements such as color and fonts consistent?]

(1)	(2)	(3)	(4)	(5)
-----	-----	-----	-----	-----

RECOGNIZABLE BRAND BY BUSINESSES, STAKEHOLDERS & COMMUNITY MEMBERS

[How familiar is your event brand in the community? Is it identifiable by the business community? Downtown stakeholders? General Public?]

(1)	(2)	(3)	(4)	(5)
-----	-----	-----	-----	-----

RIGHT FIT FOR AUDIENCE YOU ARE TRYING TO ATTRACT

[Is the brand appealing to the audience you want to attract to your event?]

(1)	(2)	(3)	(4)	(5)
-----	-----	-----	-----	-----

BRANDING

BRANDING SCORE

Tally score from quiz on page 7.

____ / 20

>> Recommendation: Scores of 15 & below need additional discussion on how to improve branding as part of overall event.

WHERE IS YOUR EVENT BRAND REPRESENTED?

[Circle all that apply]

- Banners
- Billboards
- Communication Pieces
- Digital Graphics
- Direct Mail
- Email Marketing
- Event Signage
- Logo
- Print Material
- Public Access Channel
- Social Media
- Staff / Volunteer Shirts
- Tickets
- Website

Other _____

Other _____

Other _____

IMPROVE YOUR BRANDING GRADE

IMPROVEMENT
STRATEGY

Want to go from good to great when it comes to your event brand? Consider implementing these strategies to improve your score.

ATTRACTIVENESS & PROFESSIONALISM

- Work with a professional graphic design firm; don't be afraid to pay for a professional design
- Use tools like canva.com to create your own brand using provided templates
- Keep the design simple and don't try to include more information than what's absolutely necessary

COHESIVENESS

- Considering all the places your brand is represented (see list on the left), ensure you are using the same logo, fonts, and colors throughout
- Create a style guide for staff, volunteers, & other stakeholders to reference

RECOGNIZABLE

- Keep the brand consistent year to year (this can also save design dollars by not having to recreate postcards, posters, etc. from scratch but only updating dates and photos)
- If possible, allow the event brand to be consistent with the MS organization's brand (fonts, colors, style)

RIGHT FIT

- Update / refresh your brand (recommended that you consider a refresh every 3-5 years depending on how your audience has changed and to keep your visuals interesting)
- Consider what's visually appealing the demographic you want to attract to the event

AUDIENCE

Knowing who your audience is will help you make the most cost effective and appropriate marketing and advertng decisions. By evaluating the effectiveness of your marketing efforts, your event will become stronger.

DESCRIBE THE AUDIENCE THAT CURRENTLY ATTENDS YOUR EVENT

Gender:

☐ Male

☐ Female

☐ Both

Age Range:

☐ 0-12

☐ 12-18

☐ 18 - 24

☐ 25 - 34

☐ 35 - 44

☐ 45 - 54

☐ 55 - 64

☐ 65+

Zip Code(s):

Income Level:

☐ Under \$50,000

☐ \$50,000 - \$75,000

☐ \$75,000 - \$100,000

☐ \$100,000 - \$125,000

☐ \$125,000 - \$150,000

☐ \$150,000+

Interests:

Other:

☐ Couples

☐ Families

☐ Millennials

☐ Grandparents

☐ Kids

☐ Tourists

HOW TO:

Determine Your ACTUAL Audience

- Build an asset list with attendee names, addresses, & email. From this information draw conclusions regarding gender & zip codes.
- Take a visual inventory - who's there? Determine gender and age ranges.
- Take a visual inventory of parking lots during the vent. Draw conclusions on income level based on vehicle make, model, and year.
- Consider a patron survey offered to attendees asking for this information.

TARGET AUDIENCE

There is a difference between who your ACTUAL audience is and who your TARGET audience is. Your ACTUAL audience shares common demographics like age, income level, and location of the patrons who actually show up to your event. Your TARGET audience shares common demographics of the patrons you WANT to attend your event. Your TARGET audience can be identified and should align with your Transformation Strategy. This is important for the growth of the event. As the event grows, you want to reach new audiences (perhaps from a different zip code) by recognizing the need to establish a marketing strategy that reaches both your ACTUAL & TARGET audiences.

DESCRIBE THE TARGET AUDIENCE THAT YOU WANT TO ATTEND YOUR EVENT:

Gender

Age Range

Zip Code(s)

Income Level

Interests

Other:

- | | |
|-----------------------------------|------------------------------------|
| ☐ Couples | ☐ Grandparents |
| ☐ Families | ☐ Kids |
| ☐ Millennials | ☐ Tourists |

HOW TO:

Attract Your Target Audience

Create a marketing strategy that will advertise directly to your target audience. Potential options to accomplish this include

- Consider an Every Door Direct Mail postcard. This can expose your event to a cold audience. The United States Postal Service allows you to target certain mail carrier routes within specific zip codes and even provides the average household income of those routes. Non-profits receive an excellent postage rate for this type of delivery. Remember your budget will have to include the cost to print the postcards, the postage, and if using a mailing house, a small mailing fee. [<https://eddm.usps.com>]
- Social media advertising can also be extremely targeted. It allows for ads to be shown to specific genders, age ranges, locations, interests, and more. If this is not something you're an expert at, work with a digital ad agency if your budget allows for that or request additional training on this subject through the Michigan Main Street Program.

TARGET AUDIENCE

WHERE DOES YOUR ACTUAL AUDIENCE GET THEIR LOCAL INFORMATION FROM?

- ☐ Local Newspaper
- ☐ Facebook
- ☐ Instagram
- ☐ Other Social Media
- ☐ Radio
- ☐ Emails
- ☐ Word of Mouth
- ☐ Other _____

WHERE DOES YOUR TARGET AUDIENCE GET THEIR LOCAL INFORMATION FROM?

- ☐ Local Newspaper
- ☐ Facebook
- ☐ Instagram
- ☐ Other Social Media
- ☐ Radio
- ☐ Emails
- ☐ Word of Mouth
- ☐ Other _____

What should you do with this information?

Understanding where your audience gets its information from will help you identify the best use of your advertising dollars. Use this information to ensure your advertising dollars are being spent using the right resources. Next determine if there is any overlap in sources. You can create efficiencies in your spending if one or more of the avenues is a sources of information for both audiences. Finally, look for discrepancies. As an example, if you determine your audience gets most local information through social media, don't continue to spend money in advertising in the local paper.

BEST PRACTICE

EVENT ATTENDANCE

of Attendees: _____

Previous Year -
of Attendees: _____

% of increase /
decrease: _____

BEST PRACTICE

Event growth should be between 10-20% each year.

TRACK EVENT ATTENDANCE

There are several strategies that can be used to determine event attendance. Consider the following methods

- Track registrations and/or ticket sales
- Count enter-to-wins and/or intercept surveys which often make up about 25% of total attendance (depending on how active you are getting people to sign up)
- Count crowds of people throughout the event and estimate how often the crowd turns over.
- Count cars or traffic entering / exiting area parking lots
- Enlist the help of others - public safety officials are sometimes trained in estimating crowd attendance

HOW TO:

MARKETING

Complete the following inventory identifying various marketing efforts:

BEST PRACTICES

Developing your own asset list is a crucial tool! Use it to develop patron loyalty by regularly communicating about the event through email and direct mail. Asset lists can be utilized as a Facebook, Instagram or other digital advertising tool and can help identify your target demographic.

Tangible marketing pieces such as a postcard or rack card are an invaluable foundation to your marketing efforts. The design sets the tone for the brand of the event. This is a cost effective way to get event info into the hands of potential attendees. Materials can be distributed to businesses, city hall, schools, churches, daycare centers, condo associations, library, etc.

EVENT MARKETING MUSTS:

Not
Doing It

Somewhat
Doing It

Executing
With
Excellence

DEVELOPING YOUR
OWN ASSET LIST

☐
☐
☐

POST ORGANICALLY
ON SOCIAL MEDIA
ABOUT EVENT

☐
☐
☐

HAVE AN UP-TO-DATE
EVENT WEBSITE

☐
☐
☐

CREATED A
FACEBOOK EVENT

☐
☐
☐

PRODUCE A TANGIBLE
MARKETING PIECE FOR
DISTRIBUTION

☐
☐
☐

HAVE AN EVENT
HASHTAG & USE IT

☐
☐
☐

SEND PRESS
RELEASES & FOLLOWS
UP WITH MEDIA

☐
☐
☐

Marketing inventory continues on next page.

What is an Asset List?

An Asset List is essentially your customer list - the names, addresses, emails, and any other relevant information you can collect about the people who attend your event.

MARKETING

BEST PRACTICES

Most local media websites (TV, newspaper and Radio) have an Event Listings page. Take time to load your event on as many websites as possible. News sources often scan the calendars for stories which could yield additional coverage.

All events should be listed on your Main Street Organization's website!

EVENT MARKETING MUSTS:

Not Doing It Somewhat Doing It Executing With Excellence

HAVE AN OFFICIAL EVENT PHOTOGRAPHER

☐ ☐ ☐

PARTNERED WITH LOCAL BLOGGERS / INFLUENCERS

☐ ☐ ☐

UTILIZING EVENT LISTINGS

☐ ☐ ☐

UTILIZE MS ORGANIZATION'S WEBSITE

☐ ☐ ☐

HAVE AN EVENTS CALENDAR ON WEBSITE

☐ ☐ ☐

IDENTIFY MARKETING PARTNERS

Other community stakeholders may be inclined to help you promote your event. Identify your additional marketing partners.

- ☐ Local Government (City)
- ☐ Surrounding Government (Twp. or County)
- ☐ Chamber of Commerce
- ☐ Convention & Visitors Bureau
- ☐ Library
- ☐ School District
- ☐ Local Businesses
- ☐ Other _____

CROSS PROMOTION WITH LOCAL BUSINESSES

BEST PRACTICE

Local businesses may be willing and able to help with event marketing. Below are ways they can help with publicity:

- Distribute event flyers / postcards in business or in shopping bags
- Hang event posters in windows
- Share the event on their social media pages
- Include event information in businesses' e-blasts
- Include event information in their advertising
- Share their customers lists (names & addresses with you to mail an event flyer to
- Talk up the event with their customers

MARKETING & ADVERTISING

DETAILED EVENT MARKETING & ADVERTISING BUDGET

Paid Advertising Expenses:

Direct Mail: _____

Print Ads: _____

Every Door
Direct Mail: _____

Social
Media: _____

Newspaper
Inserts: _____

3rd Party
Websites: _____

Radio: _____

Other: _____

Marketing Expenses:

Graphic
Design: _____

Printing: _____

Signage /
Banners: _____

Postage: _____

Tickets: _____

Giveaways: _____

Website: _____

Other: _____

TOTAL MARKETING &
ADVERTISING EXPENSES: _____

WHAT PERCENTAGE OF
TOTAL EVENT EXPENSES
IS MARKETING &
ADVERTISING? _____

TOTAL EVENT EXPENSES: _____

**BEST
PRACTICE**

Your marketing and advertising budget should be
between 40% - 60% of your total event expenses.

COMMUNICATION

EMAIL MARKETING COMMUNICATION CHECKLIST

- ☐ Have a patron email list and continue to grow it
- ☐ Sent a Save-the-Date email 6 months prior to event
- ☐ Sent a Save-the-Date email / Join the FB event 3 months prior
- ☐ Sent a "What's New" / Gave compelling reasons to attend Email 1 Month Prior
- ☐ Sent a "Here's what you need to know" Email 1 week prior
- ☐ Utilized high quality photos
- ☐ Shared event info as concisely as possible
- ☐ Had an average open rate of 15%

[Average open rate means the average number of unique opens in relationship to the total number of emails sent.]

SOCIAL MEDIA COMMUNICATION CHECKLIST

- ☐ Created a Facebook event
- ☐ Did a Facebook Live
- ☐ Incorporated event posts into organic content calendar
- ☐ Asked for feedback regarding event planning details
- ☐ Ran a contest following FB guidelines
- ☐ Took time to react to comments (good and bad) in a timely manner - both organically and within the event
- ☐ Asked for patrons to post pictures or tag event / organization / downtown
- ☐ Used an event hashtag
- ☐ Had a dedicated person reacting to social media during the event

RESOURCES

- View a sample of the four event e-blasts listed above in the Tool Kit.

Asset Lists:

Developing a patron data base

The easiest way to collect patron information is through a simple Enter To Win.

- Locate this area in a high traffic section of the event
- Utilize engaging volunteers to encourage patrons to sign up
- Ask for name, address, and email
- Raffle something off hourly
- Let the winner pick the prize

If you are selling tickets to the event, capture information when tickets are purchased.

BEST
PRACTICE

BUDGET

Creating an event budget is crucial to the event planning process. It provides a road map to help meet the overall goals of the event. Include all potential revenue and expenses in your event budget to show a true picture. If necessary, research actual costs for each expense as you're developing your budget.

REVENUE:

Admission / Ticket Sales:

Vendor Fees / Booth Sales:

Food Sales:

Sponsorship:

Other:

TOTAL:**EXPENSES:**

Advertising & Marketing:

Amenities:

City Services / Cross Charges:

Decor / Props:

Entertainment:

Fees:

Incidentals:

Rentals:

Rent / Venue Costs:

Misc. / Other:

TOTAL:

BUDGET

Event Profitability

What type of an event are you producing?

- ☐ General Community Event [examples - concert series, halloween parade, or tree lighting ceremony where the overall goal is to bring people downtown].
- ☐ Retail or Business Promotions Event [examples - ladies night out, restaurant week, or sidewalk sales where the overall goal is to drive traffic to businesses and make their cash registers ring].
- ☐ Fundraising Event [examples - art fair, wine tasting, or 5K race where the overall goal is raise additional funds for your MS organization].

**BEST
PRACTICE**

General Community Events

- Will likely be a straight expense in the MS Organization's budget showing little to know revenue generated from this event. Some expenses may be off set by sponsorship.

Retail or Business Promotion Events

- Should be revenue neutral meaning an equal amount of revenue is taken in to offset all expenses. Businesses that benefit from this event should provide some skin in the game -they should share in the cost of the event expenses as they are the ones benefiting from the event.

Fundraising Event

- Needs to make a profit. Establish a benchmark of your event's profitability (for example you profited \$5,000) and then try to increase that amount each year.

FUNDRAISING

MS Organizations can raise funds either through cash contributions or in-kind donations for their event through sponsorship efforts. A cash contribution is money received to help support the overall expense of an event. In-kind donations are contributions of needed event supplies, materials, or other items where the MS Organization would otherwise have to pay for those specific items.

ASSESSING THE FINANCIAL NEEDS OF YOUR EVENT

Event revenue may come from a variety of sources including admissions / ticket sales, vendor fees / booth sales, food sales, sponsorship, and other sources.

CALCULATING YOUR FINANCIAL NEED

How do you know what your financial needs are? First, consider your event goals. Is the goal of the event to generate profit? If so, how much? Second, review your budget projections of all other revenue sources? Are they realistic? Are they conservative? Does your projected revenue cover all expenses? Does your projected revenue include the profit you want to generate?

CALCULATING NEED FOR SPONSORSHIP

Any potential gaps between revenue and expenses need to be covered by sponsorship dollars. Both cash contributions and/or in-kind donations will work - whatever will help increase your projected revenue or decrease your expenses.

Determine the gap by subtracting total expenses from projected revenues. If your event is meant to generate a profit, also subtract your ideal profit from projected revenues. If the number is negative, it represents the gap in your event budget and sets your goal for what you need to raise through sponsorship.

WHAT ARE YOU FUNDRAISING FOR?

Gain additional support of your event by sharing what you will do with the money raised. You can share "this event supports your local MS Organization operations" however it is often more effective to be specific. Consider things like "the proceeds from this event supports the downtown flower pots all summer long" or "will go towards the installation of new LED Christmas lights on Main Street" or "will produce a promotional video that will be used to market our downtown". You should provide an example of something already incorporated into your MS Organizations budget and annual work plan.

BEST PRACTICE

CALCULATING NEED FOR SPONSORSHIP

Projected Revenue: _____

Total Expenses: - _____

= _____

Ideal Profit: - _____

= _____

 If negative, this number represents the gap in your event budget and sets your goal for what you need to raise through sponsorship.

SPONSORSHIP

DO YOU OFFER EVENT SPONSORSHIP OPPORTUNITIES?

☐ Yes

☐ No

DO YOU UPDATE YOUR SPONSORSHIP PACKAGES YEARLY?

☐ Yes

☐ No

TOTAL EVENT SPONSORSHIP (\$):

SPONSOR NAME	AMOUNT CASH OR INKIND	SPONSOR LEVEL / BENEFITS	# OF YEARS AS A SPONSOR	LIKELIHOOD OF RENEWAL
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

SPONSOR FOLLOW UP

Once the event wraps up, what next steps do you take to follow up with your event sponsors?

- ☐ Verbal thank you
- ☐ Hand written thank you note
- ☐ Social media thank you mention
- ☐ Post-event sponsorship report
- ☐ Other _____

When do you ask a sponsors to renew for the following year's event?

- ☐ Within 1 month after event's conclusion
- ☐ Between 2 - 5 months after the event's conclusion
- ☐ About 6 month before the next event

THANK YOUR SPONSORS

Thank your sponsors early and often. Give them as much public recognition as possible! Following the event, thank them verbally with a phone call. Send a hand written thank you signed by your entire Board and/or committee and post a public thanks on social media.

SPONSORSHIP REPORT

Provide sponsors with a post-event report summarizing the successes. Provide details of all areas in which the sponsor gained exposure through marketing collateral and show examples whenever possible. For example, take screen shots of social media posts and include in your report.

SPONSORSHIP RENEWAL

Begin speaking with your sponsors about renewal within one month after the event concludes.

COMBINING ALL SPONSOR OPPORTUNITIES

Consider creating a sponsorship proposal for all events. This will make it easier to collect funds one time per year rather than making multiple asks. You will need to know each individual event's fundraising need but potential sponsors will appreciate the opportunity to participate in all events as well as only being asked one time.

BEST PRACTICE

SPONSORSHIP

WHY DO BUSINESSES WANT TO SPONSOR YOUR EVENTS?

- Marketing Collateral (Impressions)
- Brand Visibility
- Corporate Responsibility
- Recognition
- Exclusivity
- Hospitality Benefits
- _____
- _____

RESOURCES

Find in the Tool Kit:

- Sponsorship Package
- Post Event Sponsorship Report
- Sample Sponsorship Contract

WHAT SPONSOR BENEFITS DO YOU HAVE TO OFFER?

- ☐ Naming rights ("Presented by")
- ☐ Web link & logo inclusion on marketing materials
- ☐ Co-branded organic or paid social media posts tagging sponsor
- ☐ Advertisement or bounce-back on back of event ticket
- ☐ Web link & logo on MS org's website / event website
- ☐ Signage / banners
- ☐ Brand exclusivity
- ☐ Space within event / demo area
- ☐ Verbal recognition at the event
- ☐ Free tickets
- ☐ Logo / name inclusion on event merchandise
- ☐ Other

SPONSOR BENEFITS

Create realistic sponsorship packages. Sponsorship levels should align with the benefits you are able to provide. Your top package will include all sponsor benefits that you can offer. Eliminate some of those benefits to create lower level sponsorship packages. As you assign dollar values to your packages, keep in mind any potential gaps in your budget and what your sponsorship goals are.

BEST
PRACTICE

SPONSORSHIP IS RELATIONSHIP BUILDING

Personal relationships are often just as important to securing a commitment as the benefits you can provide. MS Board members, committee members, and staff should consider their professional networks when soliciting contributions.

BEST
PRACTICE

LAYOUT & EVENT FLOW

Patrons want to feel connectedness and safe as they traverse your event. The layout and flow create an organized experience giving meaning to what is happening and where. Logistical elements such as proximity to electricity, parking, and open space can impact layout.

DESCRIBE THE TYPICAL PATRON FLOW TO AND FROM THE EVENT:

[Consider the path the patron takes from parking to event activities to interacting with businesses, etc.]

EVENT SIGNAGE:

Is there sufficient signage to direct patrons to the following areas?

- ☐ Parking
- ☐ Bathrooms
- ☐ Specific Event Activities
- ☐ Information Area
- ☐ Other _____

Is your signage well-branded, easy to read, and concise?

- ☐ Yes
- ☐ No

SAFETY CONCERNS:

Are there any areas of the event that pose a potential safety concern for patrons? (people crossing the street mid-block, uneven pavement, etc.)

Does the event layout include an open perimeter or a closed perimeter?

Open Perimeter = no delineation between event activities and normal vehicle traffic.

Closed perimeter = designated event footprint closed to vehicle traffic.

LAYOUT & EVENT FLOW

EVENT GROWTH:

Does the event footprint have room to grow?

- ☐ Yes
☐ No

Have you identified new areas that the event can grow into?

- ☐ Yes (List Options Below)

- ☐ No

PARKING:

Is there adequate parking for event patrons?

- ☐ Yes
☐ No

Do you utilize shuttles for downtown employees or for patrons?

- ☐ Yes
☐ No

PLACEMENT OF ACTIVITIES:

Are event activities placed so there is a continuous flow in traffic?

- ☐ Yes
☐ No

CONNECTION TO BUSINESSES:

Does your event layout maximize exposure to business store fronts?

- ☐ Yes
☐ No



This may be an important factor depending on the goal of your event. Some community events take place within parks located in the district, but not very close to the business core and that is okay if the event's goal is not to drive traffic to retail locations.

LEGAL & RISK MANAGEMENT

This section will help you evaluate your MS Organization's compliance with local permits, insurance coverage, and emergency preparedness.

PERMITS

Does the event require street closures? ☐ Yes ☐ No

Are special event permits required? ☐ Yes ☐ No

Is Council approval necessary? ☐ Yes ☐ No

Is a Use of Public Property permit necessary? ☐ Yes ☐ No

(Some communities may have this covered within their special event permit).

WHO TO TALK TO & WHEN

BEST PRACTICE

You will likely want to begin speaking with your City Manager about event permitting and what is required. In some communities, Council approval or even a public hearing is necessary to close streets or use public property. Permits are usually completed 4-6 months in advance depending on your communities preferences - ask your Manager when the best time to complete the paperwork is.

INSURANCE COVERAGE

When was the last conversation you had with your insurance representative about the event? _____

Do you have special event coverage through the municipality? ☐ Yes ☐ No

Do you have special event coverage obtained on your own? ☐ Yes ☐ No

Is Liquor Liability Insurance needed? ☐ Yes ☐ No

Do you require volunteers / exhibitors / vendors to sign a waiver / hold harmless agreement? ☐ Yes ☐ No

Do you require food vendors to provide you a copy of their health department permit and/or a certificate of insurance? ☐ Yes ☐ No

HOW DO YOU KNOW WHAT YOU NEED?

BEST PRACTICE

Take time to speak with your insurance representative and attorney each year regarding your special events. Get guidance on what type of coverage you need and who needs to complete a hold harmless agreement in order to protect your organization.

Don't make additional requirements for participants cumbersome. Streamline the process for them by including requirements upfront or in the application process.

LEGAL & RISK MANAGEMENT

EMERGENCY PREPARATION

Are Two Way Radios carried by staff and key volunteers during the event?

☐ Yes ☐ No

Is additional security personal needed? (Local PD or private)

☐ Yes ☐ No

Is trained medial staff (fire/EMT) onsite during the event?

☐ Yes ☐ No

Is there a team in place that will determine if the event is cancelled due to severe weather?

☐ Yes ☐ No

Is there a method for communicating to vendors, volunteers, staff, attendees, and other stakeholder in the event of a cancellation due to weather or other emergency?

☐ Yes ☐ No

EMERGENCY PREPARATION

Prior to your event taking place, take time to sit down with your Police Chief or a police liaison to discuss potential emergency situations, how to handle them and how to disseminate information. These may include severe weather, threats of terrorism, medical emergency, fire, or other harmful situation.

CANCELLING AN EVENT

Cancelling an event is the last thing you want to do. However, if the public's safety is at risk, it may be unavoidable. Lean on emergency experts such as police and fire professionals to help make the call. The decision should be a collaborative one, with MS Board members, staff, and police working together to determine the best outcome.

If the possible cancellation is due to a weather emergency, try to postpone the event hours or cancel for a portion of the day but reopen the event after the emergency has cleared.

BEST
PRACTICE

EXPERIENCE

You want to create a memorable event. Evaluate the experience of your event stakeholders, specifically the patrons who attended or participated in your event.

STAKEHOLDER GROUP: ATTENDEES / PATRONS

Rate your perception of the attendees' experience in the following areas:

Unpleasant
Experience

Neutral

Top-Notch
Experience

1

2

3

4

5

Pre-Event Communication

1

2

3

4

5

Ease of getting to event

1

2

3

4

5

Cleanliness of street and surrounding areas

1

2

3

4

5

Cleanliness within event footprint

1

2

3

4

5

Ease of locating specific activities

1

2

3

4

5

Businesses open and welcoming

1

2

3

4

5

Received great customer service from event staff and volunteers

1

2

3

4

5

Quality of activities met their expectations

1

2

3

4

5

Ease of buying tickets / registering (if applicable)

1

2

3

4

5

Offered goods that people wanted to buy

1

2

3

4

5

[TIP: If lots of people are carrying shopping bags, they're likely having a good shopping experience.]

EXPERIENCE

WHAT EVENT AMENITIES DO YOU OFFER?

- | | |
|---|---|
| ☐ Event Map / Program | ☐ Background Music |
| ☐ Accessible Staff & Volunteers | ☐ Photo Area / Props / Booth |
| ☐ Directional Signage | ☐ Sufficient Garbage Cans |
| ☐ Clean Bathrooms | ☐ Prize Giveaway / Enter to Win |
| ☐ Announcements / Event Reminders | ☐ Promotion to draw traffic into businesses |
| ☐ Information Area | ☐ Other _____ |
| ☐ Other _____ | |

EXPERIENCE

STAKEHOLDER GROUP: ATTENDEES / PATRONS

Patron Engagement

SOCIAL MEDIA ENGAGEMENT

Patrons will engage with an event or organization on social media. They may "like" a post, "comment" on a post, share event information or post pictures from the event.

TOTAL POSITIVE ENGAGEMENT ON SOCIAL MEDIA POSTS

RELATING TO THE EVENT: [Total all likes, comments, shares, posts, & direct messages] _____

TOTAL NEGATIVE ENGAGEMENT ON SOCIAL MEDIA POSTS

RELATING TO THE EVENT: [Total all likes, comments, shares, posts, & direct messages] _____

TOTAL TIMES EVENT HASHTAG WAS USED: _____

VERBAL FEEDBACK

Often times patrons will take the time to share a positive or negative experience with staff or volunteers at the event.

TOTAL POSITIVE COMMENTS MADE TO EVENT STAFF OR VOLUNTEERS: _____

TOTAL NEGATIVE COMMENTS MADE TO EVENT STAFF OR VOLUNTEERS: _____

POST EVENT SURVEYS

As you develop your customer mailing and email list, take time to send out a post event survey to patrons. This allows you to gather honest feedback on patron's experiences. By asking both quantitative questions and open ended questions you can measure the patron's experience year to year as well as gather anecdotal evidence for areas of success and improvement.

NUMBER OF SURVEYS COMPLETED: _____

NET PROMOTER SCORE: _____

% OF PATRONS WHO INDICATED THEY WOULD RETURN: _____	WOULD NOT RETURN: _____	UNSURE IF THEY WOULD RETURN: _____
---	-------------------------------	--

ECONOMIC IMPACT

ECONOMIC IMPACT OF EVENT ON DOWNTOWN BUSINESSES:

	Retail	Restaurant	Service
Total Number of Businesses in your District	_____	_____	_____
[This information is available from your Building & Business Inventory.]			

	Retail	Restaurant	Service
Number of Businesses Impacted by Event	_____	_____	_____
[This can be all of the businesses within your MS District or those within a certain footprint of the event.]			

	Retail	Restaurant	Service
Number of Businesses who were open during the majority of the event hours	_____	_____	_____
[Being aware of this can help you assess the weight of the business surveys.]			

	Retail	Restaurant	Service
Number of businesses who completed survey	_____	_____	_____
[You need responses from a majority of businesses who were impacted by the event.]			

Information should be gathered via business survey:

[Include % of responses that answered the following statements.]

	Retail	Restaurant	Service
Indicated they saw an immediate increase in sales (include average % of increase)	_____	_____	_____
Indicated they had additional foot traffic	_____	_____	_____
Indicated they saw new customers	_____	_____	_____
Indicated they wanted to see the event continued	_____	_____	_____

BENCH MARKING THE ECONOMIC IMPACT OF EVENTS

There are numerous factors, such as the type of event you're producing, the businesses' fit related to what patrons are looking for, or even the businesses' participation that contribute to an event's overall economic impact in downtown. In order to measure the economic impact and growth in future years, establish a benchmark. Use the metrics on the following page to establish a baseline for your current event and note the net change when gathering the same data next year.

BEST
PRACTICE

ECONOMIC IMPACT

DON'T LOSE SIGHT OF WHY YOU'RE PUTTING ON THE EVENT.

What type of event is it?

☐ Fundraising Event
[designed to generate
revenue for the MS Org]

☐ Retail or Business
Promotions
[designed to make the
businesses' cash registers
ring]

☐ Community (general)
[generates additional foot
traffic downtown, positive
experiences for patrons, and
promotes a positive image of
the MS program]

What specific event goals did you start with?
[related to economic impact]

Were these met?

☐ Yes

☐ No

☐ Unsure

☐ Kind of

Is the event in line with your organization's mission and vision?

☐ Yes

☐ No

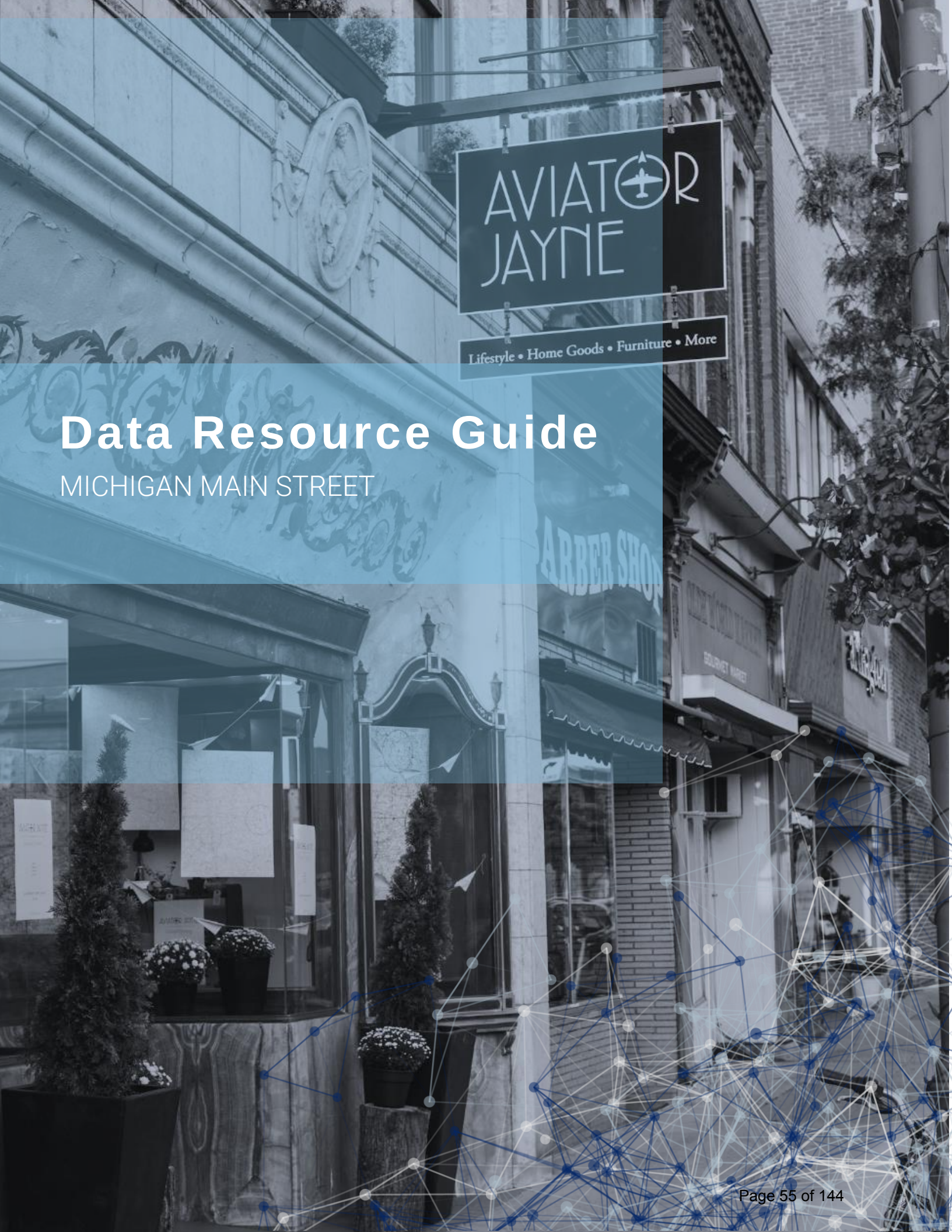
Did the event meet the specific transformation strategy measures of
success related to economic development?

☐ Yes

☐ No

What Measures of Success were met?

What Measures of Success were NOT met?



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Data Resource Guide

MICHIGAN MAIN STREET



About this guide

This guide provides a practical framework to help leadership and staff from local Michigan Main Street Programs understand how to best collect and leverage data to guide programming, support strategic planning, and communicate the value and impact of their program.

While this guide can be read front-to-back, it is likely more helpful as a resource with which the reader can skip to whichever portion is of most usefulness. We encourage Main Street programs and their leadership to reference this guide throughout the data collection process.

This guide was written by Jon Stover & Associates in partnership with Michigan Main Street.

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Introduction

Data is fundamental to Main Street programs. Quality data leads to higher quality Main Streets.



INCREASE KNOWLEDGE

Understand the conditions of your commercial district inside and out.



COMMUNICATE YOUR IMPACT

Quantify the economic, fiscal, and community impact of your work.



IDENTIFY OPPORTUNITIES

Locate potential redevelopment sites and strategically attract businesses.



GAIN SUPPORT

Raise money, build community buy-in, and advocate for your program.



DATA HELPS YOU ANSWER QUESTIONS LIKE:

- What are your district's biggest strengths and weaknesses?
- What makes your Main Street unique?
- How much has your vacancy rate declined over the past few years?
- How much private capital was invested in your Main Street last year?
- What are commercial storefront rents like in your district?
- How many properties in your district are currently underutilized?
- What have been your program's biggest accomplishments?

Local programs are required to collect and provide specific data to Michigan Main Street monthly and annually to ensure regular tracking, quality information, and provide statewide insights.

HOW DOES MICHIGAN MAIN STREET USE THIS INFORMATION?

Data collection may not be the most glamorous activity, but the numbers you report each month and year make a big difference. Having reliable local data allows Michigan Main Street to conduct statewide analyses, such as economic and fiscal impact assessments, and effectively advocate on behalf of local programs to ensure adequate and consistent funding for your program.

Many of the data points you collect are also used by National Main Street Center to measure the national economic and fiscal impact of local Main Street Programs, as well as demonstrate value to supporters. National Main Street Center also uses locally collected data to examine national trends and produce helpful resources and trainings for state and local programs (like us!).

Perhaps the most important reason for Main Street programs to collect their own local data is because it is typically the *best* data. In fall 2017, Michigan Main Street commissioned consulting firm Jon Stover & Associates to assess the reliability of locally collected Main Street program data. Economic indicators from historic annual reports were compared with one or more of the best available third-party data providers. Data collected locally by Main Street directors was found to be largely accurate. In fact, program-reported data was found to generally be more reliable than third-party data for six out of seven key economic indicators used in the study, including business count, business mix, market rent, commercial vacancy, housing, and property value. The results of this assessment highlight the important role that local Main Street programs play in helping their community quantify economic impacts and track the result of downtown investments.

WHY LOCAL DATA WORKS: THE KEY INGREDIENTS OF QUALITY DATA



Existing Relationships

Local Executive Directors generate trusted, lasting relationships with key stakeholders, which leads to more reliable and accurate data.



Local Knowledge

Main Street Programs' on-the-ground knowledge creates more accurate data than many third-party data providers.



Consistent Methodology

Consistently using the same definitions and sources allows local programs to produce highly reliable data.

Main Streets collect and report six different types of data:



BUILDING & PROPERTY

See how the physical environment and local property values are changing to assess impact and address potential challenges.



ACTIVITY & USE

Keep track of the commercial composition of your district to better understand its strengths and weaknesses.



EMPLOYMENT

Measure how your local businesses are creating and retaining jobs in your community.



HOUSING

Know how many people are moving to your district by tracking residential development and rehabilitation.



INVESTMENT

Track the dollars flowing into your area from both the public and private sectors to demonstrate support and confidence in your Main Street.



MAIN STREET

Assess your program's relationship with local stakeholders by collecting volunteer, programming, and event data.

WHY DO WE COLLECT DATA MONTHLY AND ANNUALLY?

MONTHLY DATA

Your monthly metrics, such as public and private investment, event attendees, and volunteer hours, change more frequently throughout the year, making them more accurate and easier to track when collected monthly.

ANNUAL DATA

Property and business data form the foundation of your annual data reporting. Many of the monthly data points you collect throughout the year build off this annual data. Many of these annual data points, such as market rent and property values, change incrementally, making them more useful to measure over a longer period of time.

BEST PRACTICES FOR LOCAL DATA COLLECTION

Data collection, by its nature, can be challenging and tedious. But there are ways to boost the efficiency of your collection process while still maintaining accuracy. Below are a few tips to streamline your process:



DON'T START EACH MONTHLY DATA COLLECTION PROCESS FROM SCRATCH

Use your existing data as a starting point when collecting your monthly and annual data, since it is generally faster to measure change than re-measuring your entire area. If you are certain that no change has taken place in a given category, trust your local knowledge and allocate time towards other data points that require more digging.



USE EXCEL SPREADSHEETS OR OTHER DATA MANAGEMENT PROGRAMS TO TRACK YOUR DATA

Keep your collection process as simple as possible by inputting your data into spreadsheets (for example: Microsoft Excel or Google Sheets). Remember you can also use the Michigan Main Street Building & Business Inventory spreadsheet, which is specifically designed to track property and business information, such as assessed value, housing units, and employment (the sheet also includes a few conveniently-placed collection tips!). Don't worry if you can't find a copy of the Building & Business Inventory spreadsheet: just contact Michigan Main Street and we'll send one right over to you.



SPOT POTENTIAL ERRORS BY LOOKING BACK AT HISTORICAL DATA

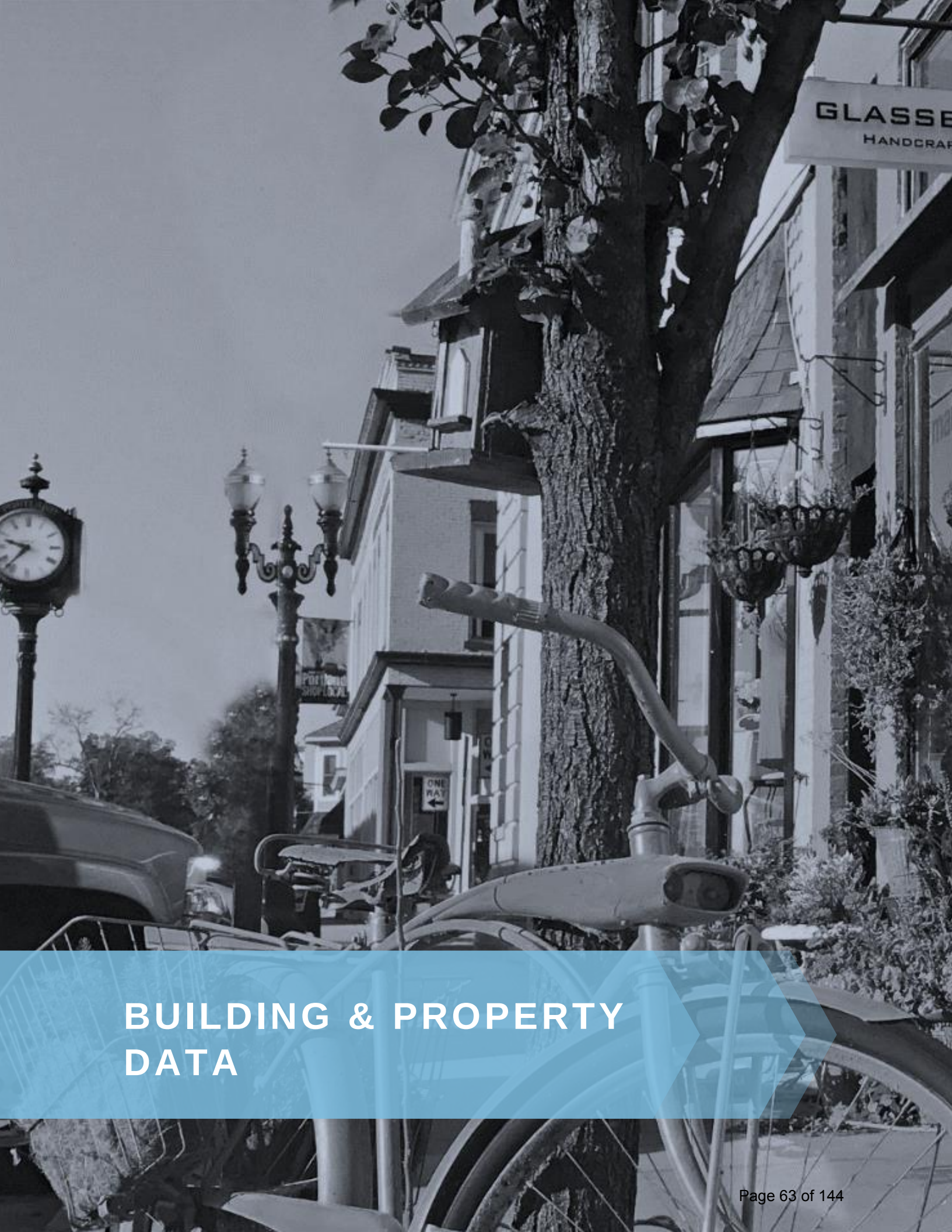
While locally-collected data is rarely perfect, the easy task of cross-checking your data with figures from previous months or years can help avoid reporting incorrect data. Before submitting your data to Michigan Main Street, look back at historical data and see if any numbers have dramatically increased or decreased. Sometimes there is an easy explanation for data fluctuations, such as a large business relocating downtown, resulting in a dramatic increase in total jobs within your district. But if, for example, your reported market rent doubled over the past year despite a lack of any major new development, that figure was likely miscalculated.

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Definitions & Collection Methods





BUILDING & PROPERTY DATA

Main Streets play an active role in creating high-quality places. Tracking how the physical environment and property values change over time helps tell the Main Street story.



ANNUAL DATA METRICS

MAIN STREET AREA VALUE

Total Taxable Value of the Main Street Area
Total Assessed Value (SEV) of the Main Street Area

TOTAL BUILDING SQUARE FOOTAGE

Total Buildings SF
Total SF of First Floor
Total SF of Upper Floors

BUILDINGS

Total Buildings
Number of First Floor Storefronts
Number of Buildings Over 1-Story
Number of Buildings Owned by Local Owners

MARKET RENT PER SQUARE FOOT

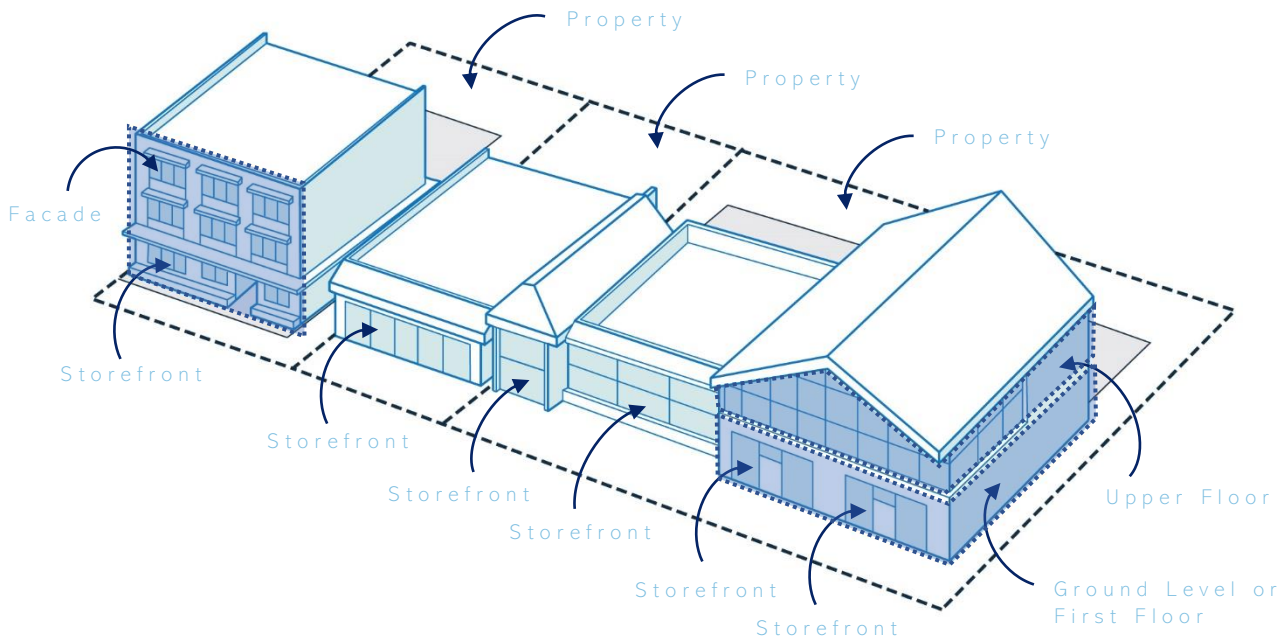
Retail Rent per SF
Office Rent per SF
Residential Rent per SF

WHY COLLECT BUILDING AND PROPERTY DATA?

Building and property data can help Main Streets benchmark changes in the community over time. The change in value of your Main Street Area can help quantify the economic, fiscal, and community impact of your work. As a common example, if your Main Street is becoming a more active, vibrant place, it's likely that property values have increased in your Main Street Area.

With detailed knowledge of the buildings in your MSA, you can help locate potential redevelopment sites and strategically attract businesses to your Main Street.





PROPERTY VS. PARCEL

All buildings are located on property lots. Typically, in Main Streets, properties are slightly larger than just the building lines and may include alleys or parking in the rear of buildings. Municipalities refer to properties “parcels” or “tax lots”. Generally, all land is divided into properties except for public roads. Keep in mind, multiple buildings can be located on the same property.

WHAT’S A FAÇADE?

A “façade” is a common term used to define the front or face of a building. Think of a façade as the exterior shell of the building that’s visible from the street or alley.

WHAT’S A STOREFRONT?

A “storefront” refers to the ground level retail space. In most Main Street environments, each building that fronts the street has one storefront – or ground level retail space. However, for large buildings, there can be multiple storefronts in the same building. A helpful rule – typically each “storefront” has a set of doors from the street per business.

MAIN STREET AREA VALUE

METRIC	SOURCE	DEFINITION
Total Taxable Value of the Main Street Area		In Michigan, the taxable value is the figure used to calculate property taxes for the year. Annual taxable value can only increase by a maximum of 5% per year, unlike assessed values which are not capped.
Total Assessed Value (SEV) of the Main Street Area		By Michigan law, the assessed value of a building can be no more than 50% of its estimated market value. Assessed values become "State Equalized Values" once assessment figures are approved by local and state boards. While often listed separately, the "Assessed Value" and "SEV" are typically the same number.

TOTAL BUILDING SQUARE FOOTAGE

Total Building SF		Sum of the square footage of each building in the Main Street Area. The total building SF of your Main Street Area may not equal the sum of the total square footage of all of the first floors and upper floors if buildings have basements or below grade floors.
Total SF of First Floor		The total square footage of all first floors, or ground levels, of a building. If a building is only one story, this is the entire square footage of the building.
Total SF of Upper Floors		The total square footage of all upper floors in buildings, excluding the first floor or ground floor. Upper floor square footage does not include square footage of roofs or rooftop patios unless they are enclosed as building space.

Check out page 21 to learn about "net" vs. "gross" square footage.

RECOMMENDED DATA COLLECTION METHOD:



Ask your municipality to provide you a spreadsheet of the properties in your Main Street Area.

Your City or County planning or GIS mapping staff can often provide you with parcel and property information in an Excel spreadsheet. For many municipalities, they will be able to provide you with all of the information you need to track! You can also try contacting your City or County Clerk if you have additional questions about assessed or taxable property values.

You'll want to make sure you have this information available when you call or stop into the municipality offices:

- Boundary map, description, or list of addresses.
- GIS shapefile (if you have one)

Here are a few specific questions to ask your municipality:

- Can you provide a spreadsheet with property information for the parcels in my Main Street Area?
- What are the total number of properties in my Main Street Area?
- What is the total taxable value of properties in my Main Street Area?
- What is the total assessed value of properties in my Main Street Area?

Don't forget that you can use your MMS Building and Business Inventory spreadsheet to record building and property data!

Ask your municipality to provide you with the square footage of each building in your Main Street Area.

Most local or county government offices have the ability to pull data on building square footage. This is generally provided with the parcel and property data. Make sure to verify with your municipality if the building data includes the square footage of all floors or if each floor is listed separately. If you are inputting parcel and property data into the MMS Building & Business Inventory, use the "Additional Building Data Tab" to input the following data points:

- Total Square Feet
- Floor Area of the First Floor
- Floor Area of the Second Floor (if applicable)
- Floor Area of the Basement or Below Grade Space (if applicable)
- Floor Area of the Third+ Floor(s) (if applicable)

Once the data for each building is inputted into the database, calculate the sum of the square footage for all of the buildings to provide you with the total square footage in your Main Street Area. Repeat this for both the Floor Area of the First Floor and Floor Area of the Second Floor and up.



BUILDINGS

METRIC	SOURCE	DEFINITION
Total Buildings		A building is typically defined as a commercial or residential structure in your Main Street Area. Many Main Street buildings are attached structures rather than free-standing buildings. Buildings are generally visually distinct with changes in building materials, style, paint colors, roof details, and entry points. Do not confuse the total number of buildings with the total properties in your Main Street Area – many properties may not have a building such as parking lots, parks, vacant land, etc.
Number of First Floor Storefronts		A “storefront” refers to the ground level retail space. In most Main Street environments, each building that fronts the street has one storefront – or ground level retail space. However, for large buildings, each “bay” may be considered a storefront. A helpful rule – typically each “storefront” has a set of doors from the street per business.
Number of Buildings Over 1-Story		Total number of multi-story buildings in your Main Street Area.
Number of Buildings Owned by Local Owners		Total number of buildings that are owned by local owners. Local owners are defined as residing within the municipality.



Walk your Main Street Area to document buildings and storefronts.

Walking through your Main Street Area, you’ll be able to count the total number of buildings (which should align with information you receive from your municipality), the number of first floor storefronts, and number of buildings over one story. Feel free to print out the MMS Building & Business Inventory and manually take notes to input into the spreadsheet.



Refer to the Property Data obtained from your local municipality.

Check the mailing addresses for all building owners. This information is typically provided with parcel and property data from municipalities. If the owner’s address is located within your municipality they are considered a local building owner.

MARKET RENT PER SQUARE FOOTAGE

METRIC	SOURCE	DEFINITION
Retail Rent per SF		The current market rent per square foot of retail spaces in your Main Street Area. This metric is not the <i>average</i> rent being paid by existing tenants, but rather the rent that a new retail tenant would be expected to pay for a space. This is typically calculated per month.
Office Rent per SF		The current market rent per square foot of office spaces in your Main Street Area. This metric is not the <i>average</i> rent being paid by existing tenants, but rather the rent that a new office tenant would be expected to pay for a space. This is typically calculated per month.
Residential Rent per SF		Current market rent per square foot of residential units in your Main Street Area. This metric is not the <i>average</i> rent of units in your district, but rather the rent that a new tenant would be expected to pay per month.

RECOMMENDED DATA COLLECTION METHOD:



Survey property managers, tenants, real estate agents, and brokers to calculate the market rent per square foot.

The amount of rent a tenant pays varies based on the type of property, quality of space, size, provided amenities, location, and many more factors. Rent per square foot is a common metric for evaluating and comparing the market value of spaces. Conduct surveys with local brokers and real estate agents to determine the *current* market rate rent per square foot for each of the three types of land uses: retail, office, and residential. In other words, what rent per square foot would a space currently on the market typically expect to cost? Lease structures and terms of the lease can dramatically impact the rent per square foot. Commercial lease structures vary from Full-Service leases which includes all taxes, utilities, and fees to Triple Net, commonly called NNN, where the tenant pays all operating costs including taxes and utilities. Pay particular attention when comparing rents between different spaces to make sure you are comparing apples to apples.

Questions to ask local brokers and real estate agents in your Main Street Area:

- What is the typical market rate rent for retail space per SF?
- What is the typical market rate rent for office space per SF?
- If they can't provide you with averages, ask for the asking price of available spaces in your Main Street Area, the type of each, and the square footage for each.

Questions to ask residential property owners and managers:

- What is the rent per SF for currently available units in your building?
- If they can't provide you with the rent per SF, ask for the typical square footage of their units and the estimated rent for an available unit.



ACTIVITY & USE DATA

Commercial, civic, and cultural spaces make up the lifeblood of your Main Street. They create jobs, attract visitors, and mold the character of a place.



ANNUAL DATA METRICS

Total Number of Businesses

Activity & Use Mix by Count and Square Footage

Underutilized First Floors

Underutilized Upper Floors

MONTHLY DATA METRICS

Number of Businesses that Opened

Number of Businesses that Closed

Number of Businesses that Moved Out of Your Main Street Area

Number of Existing Businesses that Expanded

Number of Existing Businesses that Contracted

WHY COLLECT ACTIVITY & USE DATA?

Tracking how space in your Main Street Area is being used allows you to understand its commercial composition, thereby making it easier to effectively market your district, assist business owners, and attract new establishments.

Tracking activity and use data increases your knowledge and understanding about the current conditions of your Main Street Area.

Knowing the number of businesses that have opened or expanded their operations in your Main Street Area allows you to quantify the impact of your program. These figures represent economic and fiscal impacts for your community.

Tracking the types of businesses and activities located in your Main Street Area, and the types of uses that your district is missing, can help you identify new opportunities for retail enhancement.

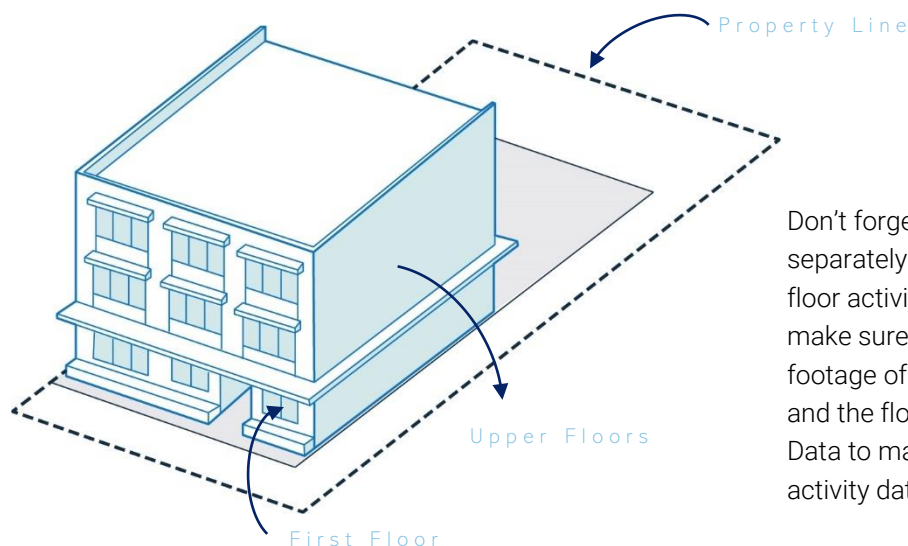


ANNUAL DATA

ACTIVITY MIX

METRIC	SOURCE	DEFINITION
Total Number of Businesses		Total number of businesses located in your Main Street Area. This includes businesses that have a storefront, as well as businesses located in a multi-tenant building. This figure should equate to the total number of businesses represented in the Activity & Use Mix.
Activity Mix by Count & Square Footage	  	Each space located in your Main Street Area must be categorized into one of 13 categories. Activity & Use Mix is calculated by both business count and square footage to determine the overall share of space in the Main Street Area by the 13 categories.
Underutilized First Floor Spaces		First floors are considered underutilized when they are vacant, primarily used for storage, or infrequently open to customers. For example, if storefront is technically leased, but it's not evident if a business is located inside, it is underutilized. Another example would be a "hobby business" that has inconsistent hours of operations.
Underutilized Upper Floor Spaces		Upper floors are considered underutilized when they are vacant or used primarily for storage. These spaces are typically not generating any revenue and could be activated with office or residential use.

FIRST FLOOR VS. UPPER FLOORS?



Don't forget to record your data separately for first floor and upper floor activities! You will want to make sure you know the square footage of each of the spaces and the floors from your Property Data to make recording your activity data easy.

RECOMMENDED ANNUAL DATA COLLECTION METHOD



Walk your Main Street Area and categorize your buildings and businesses.

Using your Michigan Main Street provided Building and Business Inventory Spreadsheet, walk your Main Street Area and record all of the businesses and other uses located within your Main Street Area. Pay particular attention to the storefronts, tenant signage, and displayed office directories. For each business, record the following information in your spreadsheet:

- Business Name
- Business Street Address
- Any General or Condition-Related Notes
- Any Underutilized First or Upper Floor Spaces

Categorize each business in your Main Street Area using the “Activity & Use Mix” definitions located in this Guide. Every business located in your Main Street Area must be sorted into one of the provided categories. Not sure how to classify a certain business? Reach out to Michigan Main Street.



Supplement your building and business inventory with parcel records from your local municipality.

Take a look back at the Parcel and Property data you previously collected. Use these property tax records as a starting point to determine business square footage. For example, if one business is operating in an entire building, the overall building square footage is the business square footage.



Ask businesses about square footage.

Surveying businesses in-person can be one of the easiest ways to collect square footage per business. Simply ask, “How many square feet in this building does your business occupy?” Business owners and often general managers will have access to this information. You can use your MMS Building and Business Inventory spreadsheet to keep track of the numbers.



ACTIVITY & USE MIX DEFINITIONS

GROCERY STORES

Sell a range of packaged foods and produce meant for consumption outside of the store. Stores categorized as “grocery” may range from corner markets to traditional grocery stores.

EATING & DRINKING

Offer eating and drinking on premises. Examples include specialty bakeries, diners, restaurants, coffeeshops, and bars.

RETAIL OCCUPIED

Goods for individual customers. Common retail spaces in Main Streets include gift shops, florists, clothing stores, hardware stores, specialty boutiques, and more.

HOSPITALITY

Establishments with the primary purpose of providing overnight accommodations for visitors. This may include hotels, motels, and bed and breakfasts.

SERVICE BUSINESSES

Establishments with the primary purpose of providing a service to customers. Service businesses often include dry cleaners, banks, funeral homes, yoga studios, gyms, salons, groomers, and repair shops.

OFFICE

All private, non-profit, and government offices. Common Main Street office uses include law, real estate, insurance, architecture and engineering, and coworking spaces.

CIVIC USES

May include public and private schools, fire and police stations, libraries, recreation centers, and community centers. This category does not include parks or other public spaces.

PLACES OF WORSHIP

Includes religious establishments with the primary purpose of worship. Ancillary uses within places of worship, such as office and recreational space should still be included as the place of worship.

AUTO BUSINESSES

Primarily sell, rent, or repair vehicles and parts, such as car dealerships, auto mechanics, rental car companies, tire and parts stores, and gas stations.

WAREHOUSES

Typically, large buildings where materials or goods are stored for future distribution or storage. Self-serve storage facilities are also classified in this category.

MANUFACTURING INDUSTRIES

Commercial enterprises where the production of physical goods take place on premises. This may range, for example, from small-scale t-shirt printing to heavy industrial uses.

ARTS & CULTURAL

Includes theaters, museums, and galleries, and any other establishments. Also includes venues and attractions that show movies, plays, comedy shows, and other performances.



TRACK RESIDENTIAL USES.

Count residential housing units when tracking your Activity and Use Mix. Flip to the Housing Data Section for more information.

VACANT

Refers to all commercial spaces, first-floor and upper-floor, that are not actively leased to a tenant. A space is no longer considered vacant if a new tenant has signed a lease and is preparing to move in. A vacant space may or may not be actively marketed for sale or lease. Retail spaces that lack a long-term tenant but feature temporary activities or establishments, such as pop-up shops, should not be classified as vacant.



UNDERUTILIZED PROPERTIES DEFINITIONS

UNDERUTILIZED FIRST FLOOR SPACES

First floors are considered underutilized when they are vacant, primarily used for storage, or infrequently open to customers. For example, if storefront is technically leased, but it's not evident if a business is located inside, it is underutilized. Another example would be a "hobby business" that has inconsistent hours of operations.



UNDERUTILIZED UPPER FLOOR SPACES

Upper floors are considered underutilized when they are vacant or used primarily for storage. These spaces are typically not generating any revenue and could be activated with office or residential use.



REMINDER:

*Underutilized spaces should be counted under **both** "Activity & Use Mix" and "Underutilized First Floor Spaces" or "Underutilized Upper Floor Spaces", since "Activity & Use Mix" should include every space in your Main Street Area.*



ACTIVITY & USE MIX FREQUENTLY ASKED QUESTIONS

WHAT IF A BUSINESS IN MY MAIN STREET AREA DOESN'T FIT INTO ANY OF THE CATEGORIES?

That's ok! First, double-check to see if the business in question can be classified as "Retail" (selling physical items) or "Service" (selling professional services). You can also contact Michigan Main Street with questions about business categorization.



WHAT IF A BUSINESS IN MY MAIN STREET AREA FITS INTO MULTIPLE CATEGORIES?

No business should be counted in multiple categories. Use your best judgement to decide which best characterizes its core service. For example, although a hair salon may sell products to clients, their primary revenue is generated from the *service* they provide their customers. Can't decide? Ask the business owner or manager – they'll be able to help you determine which is the best fit!

HOW DO I CLASSIFY NONPROFITS?

If a non-profit organization operates a storefront in your district, and sells goods or services to individual customers, then you should count them as a "Retail" or "Service" business. However, if a commercial space in your downtown is simply leased to a nonprofit for office use, count the organization in the "Office" category.

DO I NEED TO CLASSIFY EVERY BUSINESS?

Yes! It is very important that all businesses are classified. Feel free to contact Michigan Main Street if you have a question about classifying a specific business.

WHAT'S THE DIFFERENCE BETWEEN NET AND GROSS SQUARE FOOTAGE?

Every building has physical space inside, or square footage, that's not actually useable. This space often includes mechanical space, closets for water heaters, space under staircases, etc. "Gross" square footage includes all the physical space in a building regardless of whether it's usable, whereas "net" square footage refers to the usable space such as offices, bathrooms, stairs, kitchens, hallways, and more. Municipalities will typically provide you with "gross" square footage, and retailers will typically tell you "net" square footage – however, not to worry! What matters most is that you're tracking each business's square footage consistently (using either gross or net) year-to-year!

MONTHLY DATA

BUSINESS OPERATIONS

METRIC	SOURCE	DEFINITION
Number of Businesses that Opened		Total number of new businesses that opened within the past month.
Number of Businesses that Closed		Total number of businesses that are no longer operating in your Main Street Area.
Number of Businesses that Moved Out of your Program Area		Total number of businesses that are still operating as businesses but have moved out of your Main Street Area.
Number of Existing Businesses that Expanded		Total number of existing businesses that have significantly expanded their business operations or physical space.
Number of Existing Businesses that Contracted		Total number of existing businesses that have significantly reduced their business operations or physical space.

RECOMMENDED MONTHLY DATA COLLECTION METHOD:



Walk your Main Street Area and look for business openings, closings, and expansions.

Using your Michigan Main Street provided Building and Business Inventory Spreadsheet, tally how many businesses have opened or closed their doors, or added or reduced their square footage, over the past month. Having trouble finding information? Check out businesses' social media pages and websites to look for changes in operations.

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BUSINESS EXPANSION AND CONTRACTION

WHAT DOES IT MEAN FOR A BUSINESS TO EXPAND OR CONTRACT?

EXPANSION

A business expands when it increases its physical space and/or significantly changes its operations. Examples include:

- A business that used to only operate on the first floor, now expanded to the second floor.
- A restaurant added an outdoor patio space.
- A business that used to only operate one storefront, expanded and now operates two.
- A clothing store that previously only sold women's clothing now offers a men's line.
- A restaurant that now offers delivery service.

CONTRACTION

If a business reduces its physical space and/or operations, that business contracted. Examples include:

- A business that previously occupied two storefronts now only occupy one.
- A restaurant that used to operate a food truck in addition to their brick-and-mortar location now only operates the food truck.
- A business that used to be open for 7 days of the week is no longer open on Mondays.



WHAT ARE CONSIDERED SIGNIFICANT CHANGES IN BUSINESS OPERATIONS?

Changes are considered "significant" when it has a dramatic effect on employment, customer base, or amount of revenue generated. Don't worry about tracking nonsignificant changes such as minor tweaks to restaurant menus, adding a few sidewalk bistro tables, opening or closing an hour or two later or earlier, and adding a few new offerings at retailers.

EASY WAYS TO TELL IF A BUSINESS IS EXPANDING OR CONTRACTING:

Besides just asking businesses, look at your monthly employment data for significant changes! Increases or decreases in employment counts may indicate that a business has experienced a change. Keep an eye out on businesses' social media pages and website – new changes will often be announced and promoted!



EMPLOYMENT DATA

Main Streets help create jobs in the community. Local jobs foster community pride, increase the capacity of local spending, and increase the tax base of the municipality.

ANNUAL DATA METRICS

Total Number of Full-Time Jobs
Total Number of Part-Time Jobs
Total Number of Full-Time Aggregated Jobs

MONTHLY DATA METRICS

FOR NEW BUSINESSES OR EXISTING BUSINESSES THAT EXPANDED:

Number of Full-Time Jobs Added
Number of Part-Time Jobs Added

FOR EXISTING BUSINESSES THAT CONTRACTED, MOVED, OR CLOSED:

Number of Full-Time Jobs Lost
Number of Part-Time Jobs Lost

WHY COLLECT EMPLOYMENT DATA?

Employment data not only measures new jobs, but also communicates the fiscal impact of Main Street programs – more jobs often mean a stronger tax base for municipalities.

The number of employees in commercial areas is also a good indicator of the overall health of businesses. As businesses attract more and more customers they often need to hire more employees to match the demand.

Knowing the number of local employees can also help estimate the daytime population – a piece of data businesses typically look at before committing to a community.



ANNUAL DATA

METRIC	SOURCE	DEFINITION
Total Number of Full-Time Jobs		This data point represents the total number of part-time employees in your Main Street Area. Unlike the employment data you collect monthly, this data point does not measure change, but rather the total number of full-time jobs at the time of collection.
Total Number of Part-Time Jobs		This data point represents the total number of part-time employees in your Main Street Area. Unlike the employment data you collect monthly, this data point does not measure change, but rather the total number of part-time jobs at the time of collection.
Total Number of Full-Time Aggregate Jobs		This data point represents the total number of full-time <i>aggregated</i> jobs. Michigan Main Street follows the rule that two part-time jobs equal one full-time job.

RECOMMENDED ANNUAL DATA COLLECTION METHOD:



Use your monthly data to calculate your total employment counts.

When reporting your annual data, there is no need to survey businesses again. Simply look at your monthly employment data over the past month, compare it with the total employment counts of the previous year, and calculate how many full-time and part-time jobs have been added or lost.



TIP: HOW DO I AGGREGATE MY EMPLOYMENT?

When it comes to finding the “total number of full-time aggregate jobs” as part of your annual data, remember that Michigan Main Street follows the rule that two-part time jobs equal one-full time job. To calculate aggregated employment, use the following equation:

$$\text{Aggregated Employment} = \text{Total Full-Time Jobs} + (\text{Total Part-Time Jobs} / 2)$$

For example, if your Main Street program has 150 full-time jobs and 200 part-time jobs, your total aggregated employment is 250 jobs. This is a handy calculation to help compare employment figures.

MONTHLY DATA

FOR EXISTING BUSINESSES WHO EXPANDED OR NEW BUSINESSES:

METRIC	SOURCE	DEFINITION
Number of Full-Time Jobs Added		This data point represents the total <i>net gain</i> of new full-time jobs in your Main Street Area. For instance, if a business hired two new employees, but also fired one employee over the past month, the net gain would be one.
Number of Part-Time Jobs Added		This data point represents the <i>net gain</i> of new part-time jobs in your Main Street Area. For instance, if a business hired two new employees, but also fired one employee over the past month, the net gain would be one.

FOR EXISTING BUSINESSES WHO CONTRACTED, MOVED, OR CLOSED:

METRIC	SOURCE	DEFINITION
Number of Full-Time Jobs Lost		This data point represents the <i>net loss</i> of part-time jobs in your Main Street Area, including jobs lost due to a business closing or relocating outside your program boundary. For instance, if a business let go of four employees over the past month, but also hired two new employees, the net loss would be two.
Number of Part-Time Jobs Lost		This data point represents the <i>net loss</i> of part-time jobs in your Main Street Area, including jobs lost due to a business closing or relocating outside your program boundary. For instance, if a business let go of four employees over the past month, but also hired two new employees, the net loss would be two.

Flip to page 23 for detail on business expansion and contraction.

WHAT'S THE DIFFERENCE BETWEEN A FULL-TIME AND PART-TIME EMPLOYEE?

FULL-TIME EMPLOYEES

A full-time employee works 40 hours or more per week and is typically paid a set monthly or annual salary.

PART-TIME EMPLOYEES

A part-time employee works fewer than 40 hours per week and is typically paid at an hourly rate.

RECOMMENDED MONTHLY COLLECTION METHODS



Survey businesses and ask for employment figures.

If you haven't previously collected employment data from a business, make sure to collect their total number of employees, not simply the monthly change in employment. Keep track of this total employment data in a database, such as a Microsoft Excel spreadsheet, so that you can easily calculate the total number of employees in your Main Street Area at any given time and establish a baseline for future employment change.

Once you have established an employment baseline for each business, make monthly in-person visits to ask owners or managers how many full-time and part-time staff members have been added or lost over the past month, and update your data accordingly.



Supplement your locally collected data with online resources.

The Real Estate GIS Database found on the MEDC website is a helpful tool that allows the user to draw polygons on the map to see place-specific data, including the estimated number of employees by sector. This shouldn't replace your locally collected data but can be a good resource for programs looking to verify their numbers. (Flip to the next page for detailed instructions for how to use this database below)

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TIP: PROMISE CONFIDENTIALITY.

For various reasons, business can sometimes be hesitant to share employment data. Remember to always remind business owners or managers that these numbers will not be shared with any parties outside of Michigan Main Street and only used to help the Main Street program better serve local businesses and evaluate the impact and effectiveness of its own activities.



WHAT ABOUT SEASONAL EMPLOYEES?

If an employee is working 40 or more hours per week, but only on a seasonal basis, you should still count that as a full-time job.

Seasonality may explain why job counts may be higher during summer months. Main Streets with prominent seasonal economies may notice this increase followed by fewer jobs in the winter months, particularly with part-time employment. Tracking annual totals of employment help account for these changes.

FINDING LOCAL EMPLOYMENT THROUGH MEDC'S REAL ESTATE GIS DATABASE.

The Real Estate GIS database on the MEDC website is a helpful tool that can provide helpful business and employment data. Follow these steps to gain insights about your Main Street Area:

- Click on this link: <https://www.michiganbusiness.org/site-selection/commercial-real-estate-database/> or go to the Michigan Main Street website and under "Site Selection", select "Real Estate GIS Database"
- Select "Tools" and click on "Area Selection (Polygon)"
- Draw a polygon around your Main Street Area, clicking the polygon when you are finished.
- Under "View reports for this area", select "Business report"
- Scroll down to see the "# Est. Employees" in your district.





HOUSING DATA

Residential development is a critical piece of any effort to support local businesses. Residents provide a strong customer base for businesses and increase the livelihood of the district.

ANNUAL DATA METRICS

Total Number of Apartments / Lofts

Total Number of Condo Units

Total Number of Single-Family Houses

Total Owner-Occupied Units

Total Renter-Occupied Units

Total Upper Floor Housing Units (Rental or Owner)

MONTHLY DATA METRICS

NEW UNITS

Number of New Apartments / Lofts

Number of New Condo Units

Number of New Single-Family Houses

REHABILITATED UNITS

Number of Rehabilitated Apartments / Lofts

Number of Rehabilitated Condo Units

Number of Rehabilitated Single-Family Houses

WHY COLLECT HOUSING DATA?

Collecting the amount of new housing units in your district will help you quantify local demand for downtown living and demonstrate the viability of residential development, helping you attract additional projects.

Quantifying the number of new residents moving in to your area allows your program to demonstrate enhanced investment and consumer confidence in your Main Street Area.

Sharing the number of new housing units also helps you highlight your Main Street Area as a complete, mixed-use district.



ANNUAL DATA

TOTAL UNITS

METRIC	SOURCE	DEFINITION
Total Number of Apartments/Lofts		The total number of rental residential units located in multi-family buildings that are managed by a single entity, such as a corporation, and then leased to individual tenants.
Total Number of Condo Units		The total number of multi-family residential units that are owned by the resident rather than rented. Physically, a condo may look a lot like an apartment, or it can even be a townhouse - the important distinction is that each unit is owned individually and managed under a homeowner association (HOA). It's important to note, if a condo unit is rented, it is still counted as a condo rather than an apartment.
Total Number of Single-Family Units		The total number of properties in your Main Street Area that contain only one dwelling unit in the entire building. Single-family houses can be a free-standing house, or it can be an attached home like a townhouse with shared dividing walls.
Total Owner-Occupied Units		The sum of condo units and single-family houses in your Main Street Area.
Total Renter-Occupied Units	 	This metric will be equal to "Total Number of Apartments/Lofts", unless there is a condo building in your Main Street Area with a significant portion of units that are rented out. In this case, call the property manager of that building or contact your local municipality and ask how many units are rented out and add that figure to your apartment/loft count to get the total number of renter occupied units.
Total Upper Floor Housing (Rental or Owner)		"Upper Floor Housing" simply refers to the number of residential units in your Main Street Area located above a ground floor storefront.

Flip to page 34 for more detailed housing definitions!

RECOMMENDED ANNUAL COLLECTION METHODS



Use your monthly data to sum total housing units for annual reporting.

Look through the parcel and property data previously collected. Often the number of residential units are tracked in parcel data. Record this data in whatever database your program uses to track property data (remember that you can also use the MMS Building and Business Inventory spreadsheet to track this data). Pay particular attention to multifamily housing to determine if the units are condominiums or apartments. Generally, parcel data for condominiums will list multiple owners (one for each unit), which is a good indicator that they are condo units rather than apartments.

Make sure to include monthly data you collect for new units into the annually reported unit breakdown. Take demolitions and conversions into nonresidential use into account year to year so that you don't over report the number of residential units in your district.



Survey building owners, property managers, and occupants.

Building owners, property managers, and residents will be able to tell you if units are owner or renter occupied. For buildings that have housing units above storefronts, ask the owners, managers, or occupants the following questions:

- How many residential units are located above the storefront?
- How many of those units are owner-occupied and renter-occupied?



REMEMBER:

You can also use the MMS Building & Business Inventory to track this data.



MONTHLY DATA

NEW UNITS

METRIC	SOURCE	DEFINITION
Number of New Apartments/Lofts	 	Total number of brand new residential rental units that have been completed over the past month and ready to lease to tenants. These units can either be in brand new buildings or buildings that were not previously residential.
Number of New Condo Units	 	Total number of brand new condo units that have been completed over the past month and ready to be sold. These units can either be in brand new buildings or buildings that were not previously residential.
Number of New Single-Family Houses	 	Total number of brand new single-family homes that have been completed over the past month and ready to be rented or sold.

WHAT'S THE DIFFERENCE BETWEEN AN APARTMENT, CONDO, AND A SINGLE-FAMILY HOUSE?

APARTMENT

An apartment (or loft) is a rental residential unit. Buildings in Main Streets can have apartment units located above first floor retail spaces or apartment units can be in buildings or complexes that are entirely residential. Apartments in a building are managed by a single entity, such as a corporation, and then leased to individual tenants.

CONDO

A condo unit is a multi-family residential unit that is owned by the resident rather than rented. Physically, a condo may look a lot like an apartment, or it can even be a townhouse - the important distinction is that each unit is owned individually and managed under a homeowner association (HOA). It's important to note, if a condo unit is rented, it is still counted as a condo rather than an apartment.

SINGLE-FAMILY HOUSE

A single-family house is a property that contains only one dwelling unit in the entire building. Single-family houses can be a free-standing house, or it can be an attached home like a townhouse with shared dividing walls.



MONTHLY DATA

REHABILITATED UNITS

METRIC	SOURCE	DEFINITION
Number of Rehabbed Apartments/Lofts	 	The total number of rental units within buildings that have undergone significant interior improvements, resulting in an “overhaul” of the property.
Number of Rehabbed Condo Units	 	The total number of condo units within buildings that have undergone significant interior improvements, resulting in an “overhaul” of the property.
Number of Rehabbed Single-Family Houses		The total number of single-family houses that have undergone significant interior and/or exterior improvements, resulting in an “overhaul” or “flip”.

WHAT COUNTS AS A REHABILITATION?

Think substantial improvements to the units: was a home in poor condition ‘flipped’ to be sold? Did old apartments get renovated to attract higher rents? Rehabilitations typically result in an increase in property value and an improved aesthetic value from the street. A good indicator that buildings are being renovated is when there are large dumpsters located in the front or back of the property. For apartment and condo buildings, another indicator is a new promotional campaign, highlighting recent changes. Small modifications, such as new carpeting or lighting, should not be counted.



TIP:

To make sure not to double report, only count units once they are on the market to be rented or sold. This indicates that the project is complete and should be recorded.



RECOMMENDED MONTHLY DATA COLLECTION METHODS



Walk your Main Street district and look for construction.

If you see a building under construction, ask the owner or construction manager if it will have any residential units, and if so, the total number of units. If no one onsite can answer your question, contact information is usually displayed in windows or on signage. While you don't have to report the specific unit types (studio, two-bedroom, etc.) or square footage to Michigan Main Street, tracking such data in your Building & Business Inventory sheet (under "Residential Property Data") can help you get a strong sense of local housing trends.



Ask your municipality!

During the construction process for both new construction and major renovations, the unit count of the building is typically recorded to the local government during the permitting process. Check with your local government office, such as the planning and/or zoning department, for the number of units in the project. While you are speaking with your municipality, you might as well also ask about the estimated costs of the project, which you'll need for your "Private Investment" data.

Question to Ask:

- How many units are in the apartment or condo building at [address of site]?
- What is the total estimated cost of the project?
- Is the local or state government funding any portion of the project? If so, how much?



Supplement your data with online resources:

Many apartment and condo buildings nowadays have websites that detail the number of units. Feel free to call any leasing number and ask the representative for the number of units! www.Apartments.com and www.Zillow.com are also helpful sources to collect information on recently completed residential projects. Apartments.com typically provide snapshots of different apartments available to rent and the number of units in buildings. Zillow.com includes search functions to find both condominium and single-family homes that are new construction projects. These can be great resources to supplement the on-the-ground data collection.





INVESTMENT DATA

Want to measure the growing excitement and activity within your Main Street? Follow the money!

MONTHLY DATA METRICS

FAÇADE & EXTERIOR RENOVATIONS

Number of Renovations

Sum of Private Investment

Sum of Public Investment

PUBLIC IMPROVEMENT

Number of Public Improvement Projects

Sum of Private Investment

Sum of Public Investment

BUILDING REHABILITATION

Number of Building Rehabilitations

Sum of Private Investment

Sum of Public Investment

NEW CONSTRUCTION

Number of New Construction Projects

Sum of Private Investment

Sum of Public Investment

BUILDINGS SOLD

Number of Buildings Sold

WHY COLLECT INVESTMENT DATA?

Public investment demonstrates a commitment from the community to value and maintain your commercial district, while private investment demonstrates confidence in your Main Street as a strong place to do businesses and create jobs. Tracking public and private investment over time is a powerful way to tell the story of district revitalization.

Local and state municipalities typically place a high value on how much private investment is occurring in your district relative to public investment. Tracking public and private investment data is extremely valuable when advocating for the importance of your program and continued public investments in your Main Street Area.

ANNUAL INVESTMENT DATA

Your annual investment data includes private investment, public investment, and total investment in your Main Street Area.

To get this data, Michigan Main Street simply sums monthly data to provide Main Streets with annual investment totals.

Providing quality monthly data for Michigan Main Street ensures complete and accurate annual investment data.



COMMON DEFINITIONS

FAÇADE & EXTERIOR RENOVATIONS

A façade is the face of a building that looks onto a street or open space. Exterior renovations include an improvement to a building's exterior walls, roof, windows, or signage. Improvements could also include painting the exterior of the building, replacing awnings and exterior doors. If a project includes improvements to both the interior and exterior of a building, count that in the "Building Renovations & Rehabs" category.

PUBLIC IMPROVEMENTS

"Public improvements" are defined as any improvement to the public realm – or the spaces between the buildings including streets, sidewalks, parking lots, lighting, alleys, bike lanes, public signage, benches, trash cans, public arts, banners, and crosswalks.

BUILDING REHABILITATIONS

"Building renovations and rehabs" are defined as any repairing, renovating, or modifying of an existing building. This could include new carpeting, flooring, HVAC, or the installation of major appliances or interior structures. If a renovation or rehabilitation project includes improvements to both the interior and exterior of a building, classify that in this category, not in "Façade & Exterior Improvements".

NEW CONSTRUCTION

"New construction" is defined as the development of any entirely new building. This does not include small building additions, such as a patio or side deck.

BUILDINGS SOLD

"Buildings sold" refers to the number of properties in your Main Street Area that have been purchased by a new owner. This does not include the sale of any individual residential units.



TIP:

For each of the investment categories, except "Buildings Sold", Michigan Main Street requires you to track the following metrics each month:

- **Number of projects** – Total projects that have been fully completed over the past month.
- **Sum of private investment** – The total amount of dollars spent by business owners, property owners, real estate investors, or other non-governmental funders, such as philanthropies, on projects that were completed over the past month.
- **Sum of public investment** – The total amount of any state, local, or federal government funds spent on projects that were completed in the past month. This can also include a government-funded portion of a program or project. Government grants also count as a public investment.



MONTHLY DATA

FAÇADE & EXTERIOR RENOVATIONS

METRIC	SOURCE	DEFINITION
Number of Renovations		The total number of projects that enhance the face of a building that looks onto a street or open space. Exterior renovations include an improvement to a building's exterior walls, roof, windows, or signage. Improvements could also include painting the exterior of the building or replacing awnings and exterior doors.
Sum of Private Investment		Total dollar amount of façade and exterior improvements financed by business owners, property owners, real estate investors, or other non-governmental funders, such as philanthropies.
Sum of Public Investment		Total façade and exterior improvements financed using state, local, or federal government funds. This can also include a government-funded portion of a program or project. Government grants also count as a public investment.

PUBLIC IMPROVEMENTS

METRIC	SOURCE	DEFINITION
Number of Public Improvement Projects		"Public improvements" are defined as any improvement to the public realm – or the spaces between the buildings including streets, sidewalks, parking lots, lighting, alleys, bike lanes, public signage, benches, trash cans, public arts, banners, and crosswalks.
Sum of Private Investment		"Private investment" is defined as the dollars spent on any public improvement project that is financed in whole or in part by business owners, property owners, real estate investors, or other non-governmental funders, such as philanthropies.
Sum of Public Investment		"Public investment" is defined as the dollars spent on any public improvement project or program financed using state, local, or federal government funds. This can also include a government-funded portion of a program or project. Government grants also count as a public investment.



MONTHLY DATA

BUILDING REHABILITATIONS

METRIC	SOURCE	DEFINITION
Number of Building Rehabilitations		Building rehabilitations are defined as any repairing, renovating, or modifying of an existing building. This could include new carpeting, flooring, HVAC, or the installation of major appliances or interior structures. If a renovation or rehabilitation project includes improvements to both the interior and exterior of a building, classify that in this category, not in "Façade & Exterior Improvements".
Sum of Private Investment		"Private investment" is defined as the dollars spent on any renovation or rehabilitation project that is financed in whole or in part by business owners, property owners, real estate investors, or other non-governmental funders, such as philanthropies.
Sum of Public Investment		"Public investment" is defined as the dollars spent on any renovation or rehabilitation project or program financed using state, local, or federal government funds. This can also include a government-funded portion of a program or project. Government grants also count as a public investment.

NEW CONSTRUCTION

METRIC	SOURCE	DEFINITION
Number of New Construction Projects		"New construction" is defined as the development of any entirely new building. This does not include small building additions, such as a patio or side deck.
Sum of Private Investment		"Private investment" is defined as the dollars spent on any new construction project that is financed in whole or in part by business owners, property owners, real estate investors, or other non-governmental funders, such as philanthropies.
Sum of Public Investment		"Public investment" is defined as the dollars spent on any new construction project or program financed using state, local, or federal government funds. This can also include a government-funded portion of a program or project. Government grants also count as a public investment.

BUILDING SALES

METRIC	SOURCE	DEFINITION
Number of Buildings Sold		"Buildings sold" refers to the number of properties in your Main Street that have been purchased by a new owner. This does not include the sale of any residential units.



RECOMMENDED MONTHLY COLLECTION METHODS



Contact your local or state municipality.

To find the cost of publicly-funded projects and see how many buildings in your Main Street Area were sold, contact your local or state municipality. For many public enhancement projects, your department of transportation or local planning department will be the most appropriate offices to contact.

For privately-funded projects, contact your local municipality to see publicly available project permits, which typically include estimated project costs. Your local municipality should also be able to tell you the number of buildings sold in your Main Street Area over the past month.

Many public project costs are listed online, under your local or state municipality's website. Contact your local planning or zoning office to learn where your municipality stores this data.



Survey business and property owners.

For private investments, you will likely need to speak one-on-one with business or property owners to find out the cost of certain rehab or construction projects. You can typically find contact information on publicly available tax records and project permits.

Given the private nature of personal and business finances, it is important, before you begin asking questions, to remind survey responders that the information they provide will remain confidential and only be used for assessing and improving the activities of your Main Street program.



Walk your Main Street Area to look for improvements.

The easiest way to learn about physical improvements taking place in your Main Street Area is to simply walk through your district. Often you can ask for project information on the spot as a starting point to your data collection.



TIP:

Only count public or private investments upon completion of a project, to avoid double-counting. Ribbon-cutting ceremonies or the move-in date for new tenants indicate when a project is completed and thus should be recorded.



INVESTMENT DATA FREQUENTLY ASKED QUESTIONS

WHAT'S THE DIFFERENCE BETWEEN PRIVATE AND PUBLIC INVESTMENT?

PUBLIC INVESTMENT

Any project or program financed using state, local, or federal government funds. This can also include a government-funded portion of a program or project. Government grants also count as a public investment.

PRIVATE INVESTMENT

Any project or program financed by business owners, property owners, real estate investors, or other non-governmental funders, such as philanthropies.

WHAT DOES IT MEAN TO HAVE A “PUBLIC IMPROVEMENT” THAT’S PRIVATELY FUNDED?

Public improvements can be both publicly and privately funded. Public investment is generally allocated for spaces that are not privately owned, but many “public spaces” are privately owned. For example, a parking lot may be used by the public but privately owned, and therefore not a municipality’s responsibility for maintaining. When these parking lots need repaving and restriping, this is often through private investment.

Other examples may include landscaping in front of buildings and small outdoor spaces like gazebos and plazas. Oftentimes, public parks and plazas may be owned and operated by the municipality but receive sponsorships and private investment for maintenance, improvements such as new seating or playgrounds, and event programming – this is another example of a public improvement that’s privately funded.





MAIN STREET DATA

Main Street programs can't create great places on their own. Engaging the local community is a fundamental part of the Main Street Approach.

ANNUAL DATA METRICS

STAFFING

Full-Time Staff

Part-Time Staff

Executive Director Salary

Executive Director Benefits

Additional Staff Salary

Additional Staff Benefits

MONTHLY DATA METRICS

VOLUNTEERS

Total Board Volunteer Hours

Total Project (Non-Event) Volunteer Hours

Total Event Volunteer Hours

Total Volunteer Cost

TRAINING & PROFESSIONAL DEVELOPMENT

Total Training Sessions Attended

FUNDRAISING & MEMBERSHIP

Total Private

Total Public

Total In-Kind

Total Earned

EVENTS

Total Number of Events

Total Main Street Event Revenue

Sum of Gross Main Street Event Expenses

Number of Event Attendees

WHY COLLECT MAIN STREET DATA?

Tracking data such as volunteer hours, event attendees, and funds raised helps measure and convey your program's connection with the local community.

Tracking the attendees and revenue of Main Street events helps programs evaluate the success of its programming efforts.



ANNUAL DATA

STAFFING

METRIC	SOURCE	DEFINITION
Full-Time Staff		Number of staff members employed by your Main Street program who work at least 40 hours per week on average and receive an annual or monthly salary.
Part-Time Staff		Number of staff members employed by your Main Street program who work less than 40 hours per week. These staff members may be paid a salary or hourly wage.
Executive Director Salary		The annual salary of the top-ranking staff member of your program (typically the "Executive Director")
Executive Director Benefits		Employment benefits, such as health insurance or paid leave, received by the top-ranking staff member of your program.
Additional Staff Salary		The total dollar amount spent on staff member pay, excluding the salary of the Executive Director.
Additional Staff Benefits		Employment benefits received by staff members of your program.

RECOMMENDED DATA COLLECTION METHOD:



Use accounting software to report staffing data.

To accurately track the salary and benefits of your staff, use accounting software or your organization's official budget.



MONTHLY DATA

VOLUNTEERS

METRIC	SOURCE	DEFINITION
Total Board Volunteer Hours		Sum of hours spent by your program's board of directors at board meeting or advocating for your local program at meetings with partners and stakeholders. This does not include time spent on implementing projects or organizing and participating at Main Street events
Total Project (Non-Event) Volunteer Hours		Sum of hours spent by volunteers, including board and committee members, implementing your program's projects and programming, not including any hours spent organizing or at a Main Street Event.
Total Event Volunteer Hours		Sum of hours spent by volunteers, including board and committee members, at events organized or co-organized by your program. This can include time spent organizing the event prior to the day of the event, as well as time spent prepping or cleaning up on the day of the event. Total Event Volunteer Hours should only be reported once the event has been completed.
Total Volunteer Cost		The total dollars spent by your program associated with the organization and accommodation of Main Street volunteers. These costs can include, but are not limited to, food, drinks, t-shirts, and event space.

TRAINING & PROFESSIONAL DEVELOPMENT

METRIC	SOURCE	DEFINITION
Total Training Sessions Attended		Total number of training or professional development events attended by the Executive Director, board members, or volunteers.

RECOMMENDED DATA COLLECTION METHOD:



Use sign-in sheets to track volunteer hours and professional development.

For events and meetings, participants can use a volunteer log or simply fill out a sign-in/out sheet to easily track and manage hours. Keep a log at the front desk or near the door so that regular volunteers can simply fill in their time as they volunteer. Each hour spent by each volunteer counts as one volunteer hour. For example, a two-hour event with four volunteers would count as eight total volunteer hours.

Use sign in sheets to also track attendance of board members and volunteers at training and professional development events. Another way to track training and professional development could include looking back at calendars, invoices or expense reports, and verifying trainings attended by staff, board members and volunteers in the past month.



MONTHLY DATA

FUNDRAISING & MEMBERSHIP

METRIC	SOURCE	DEFINITION
Total Private		Funds raised through all private organizations and individuals including donations, sponsorships, and grants from non-government sources.
Total Public		Local, state or federal contributions including government grants.
Total In-Kind		Contributions or donations of goods or services that have a market value.
Total Earned		Funds raised from membership dues, merchandise sales, or any other goods or services offered by the organization.

RECOMMENDED DATA COLLECTION METHOD:



Use accounting software to track expenses, revenue, and fundraising.

Your program should have a system to track all expenses and revenue. Your Main Street data, such as event revenue, event expenses, private fundraising, and municipal contributions, should be pulled directly from this system. If you are having challenges tracking your organization's finances, contact Michigan Main Street for assistance.



MONTHLY DATA

EVENTS

METRIC	SOURCE	DEFINITION
Total Number of Events		The number of events that are organized or co-organized by your Main Street program. These can include general community events, retail or business promotional events, or fundraising events in your Main Street Area.
Total Main Street Event Revenue		Total revenue generated as a direct result of Main Street events. These can include ticket sales, or funds raised during events.
Sum of Gross Main Street Event Expenses		Total dollars spent as a direct result of Main Street events. These can include, but are not limited to, costs such as equipment, marketing, catering, and event space.
Number of Event Attendees		This data point tracks the number of attendees of events that are organized, or co-organized by the Main Street program itself. This could range from small business opening celebrations to large promotional events or festivals.

RECOMMENDED DATA COLLECTION METHOD:



Use work plans, calendar, and sign-in sheets to track event data.

Refer to event calendars and work plans to track the total number of events your organization is planning monthly. To track event attendance, be sure there are volunteers assigned to survey and track crowd size the day of the event.



Use accounting software and event budgets to track event revenue and event expenses each month.

When reporting the revenue and expenses of events, simply use the accounting or database management system your program already uses to keep track of finances and budgets. Make sure to consider the type of event when you record event data:

COMMUNITY EVENT

General or special event that brings activity to Main Street Area.

RETAIL EVENT

Event that drives traffic to specific businesses.

FUNDRAISING EVENT

Revenue-generating events that primarily serve as an income source for Main Street Program.

See Page 47 for additional suggestions about tracking event attendance!

MAIN STREET DATA FREQUENTLY ASKED QUESTIONS

HOW DO I ESTIMATE EVENT ATTENDANCE?

Estimating how many people attend an event can be a difficult task, particularly for public, non-ticketed events. However, having accurate estimates is important for future event preparation, especially for businesses, who may need to add staff and inventory to handle increased event traffic.

The best way to measure event attendance is to distribute tickets to your event (even if it is free). You can use event-hosting websites, such as Eventbrite, to distribute and track tickets. If your event is not ticketed, the method for estimating the number of attendees varies depending on the size of the event:

SMALL EVENTS

(<100 attendees)

Consider creating a sign-in sheet for visitors and attendees. You can also create an event page on Facebook to track the number of RSVPs. Eventbrite can also easily track RSVPs (even for non-ticketed events).

MEDIUM EVENTS

(100-400 attendees)

Hand out raffle tickets or another small item to each attendee and then see how many items you have left at the end. For example, if you brought 200 flyers to an event, passed them out to each attendee, and had 25 remaining flyers at the end of the event, you'll know that the event had 175 attendees.

LARGE EVENTS

(>400 attendees)

Speak with your local police department, who can typically provide accurate size estimates of large crowds.

For additional resources and ideas around tracking event attendance, expenses, and other information, refer to the Michigan Main Street Event Evaluation Self-Assessment tool.





Optional Deep Dive Resources

OPTIONAL DEEP-DIVE RESOURCES

The following sources are helpful resources for Main Street programs. Although these sources don't have boundary-specific data that can be used for monthly or annual data collection, they are valuable reference points when comparing your Main Street to city, county, and state statistics.

AMERICAN FACT FINDER

This user-friendly US Census portal combines dozens of annual demographic and business census surveys including American Community Survey, Economic Census, and Business Patterns data. This data can help Main Streets collect a range of information including employment, business information, demographics, housing and more. <https://factfinder.census.gov>

POLICY MAP

As an online portal, PolicyMap distributes demographic, real estate, and job data for communities across the country. <https://www.policymap.com/>

US BUREAU OF LABOR STATISTICS

Economic data such as employment rates, spending patterns, wages, and industries, are provided through the Bureau of Labor Statistics. Data is available at both the state and county-level and can provide reference for your Main Street compared to local benchmarks. www.bls.gov

UNITED STATES CENSUS BUREAU

Every decade, the Census releases data pertaining to a wide variety of topics including population, the economy, businesses, housing, and income. Data is available at a range of geographies including zip codes, municipalities, and Census blocks. Census data is available through American FactFinder as well as third-party data sources such as ESRI.

WALKSCORE

As the leading international measure of walkability, public transit accessibility, and proximity to community-serving amenities, WalkScore also provides real estate data, crime statistics, and commute travel time analysis in some markets. <https://www.walkscore.com/>

Communication Tools

To further capitalize on the monthly and annual data you collect, consider using the following tools to summarize and communicate quantitative findings about your program's operations and neighborhood's conditions.

FACE-TO-FACE MEETINGS

In-person conversations, meetings, or interviews with Main Street leadership are often the first time a community member learns about a program. Therefore, having a few key data points to share during face-to-face interactions can go a long way in building local support for your program.

ANNUAL REPORTS

Annual Reports can highlight the achievements and impacts your Main Street program each year. Consider including spotlights of success stories (such as a special event, new business, milestone achieved) and communicating your impact through Reinvestment Statistics and other performance indicators.

BOUNDARY MAP

Maintain a clear, visual boundary map of your program area to communicate to stakeholders and constituents the area of your program influences. Letter sized maps can easily be attached to grant applications and filed with Annual Reports.

MARKETING MATERIALS

Generic marketing materials such as flyers, brochures, and postcards can supply the public with a great overview of your Main Street program, significant events or achievements, and exciting news. Consider your audience for each of the materials. Are these materials to have on hand at the office? Are you trying to gain donors for a specific event? Are you updating businesses with new opportunities?

WEBSITE

Updating your program's website to include a section featuring your program's economic, fiscal, and community impacts help a diverse range of stakeholders understand the value of your program. Consider adding an "Impacts" Section or including metrics within the footer of your homepage with key statistics.

LOCAL PRESS RELEASES, ARTICLES, INTERVIEWS, AND SOCIAL MEDIA

Generating press releases and contacting local media can help generate a larger audience for your Main Street program. This can drive more participants to events or promotions, but also highlight significant impacts such as awarded grants and improved streetscanning.

SPECIAL EVENTS

Consider hosting special events such as dinners, socials, and happy hours to gather stakeholders and communicate success verbally. Think of how your event displays and vocalizes the impacts your Main Street program has generated.

ONE-PAGER

Program One-Pagers provide stakeholders with a clear snapshot of your program and its impacts. These can easily be attached to Grant Applications and fundraising efforts.

Tools to Assess Your Impact

To thoroughly quantify how your program has made an impact on your local community, economy, and fiscal strength, consider conducting the types of analyses listed below. These analyses are typically conducted by independent consultants. Contact Michigan Main Street to learn more about how to bring these additional services to your program.

ECONOMIC IMPACT ANALYSIS

An economic impact analysis can measure the economic gains, such as jobs, sales, and wages, generated by a program, or specific event or development. This can be a crucial resource when communicating the importance of your program or specific project to stakeholders. Regularly scheduled economic impact analyses can also shed light on how particular events, such as a festival or seasonal promotion, grow or decline over time, allowing programs to make more educated decisions on programming and marketing strategy.

FISCAL IMPACT ANALYSIS

A fiscal impact analysis measures the amount of tax revenue attributable to an event, development, or program. Like an economic impact analysis, this can be a valuable advocacy tool, particularly for programs that receive public dollars.

COMMUNITY IMPACT ANALYSIS

This type of analysis describes the impact programs have on their communities. These analyses typically focus on quality-of-life impacts such as social cohesion, historic preservation, safety, and design. Data for this type of impact analysis is typically more difficult to quantify but can produce results that have a wide range of appeal.

Real Estate & Market Tools

To deeply examine how real estate and market trends are impacting your businesses, or to craft materials specifically designed to attract new establishments to your commercial district, consider the tools listed below. These analyses are typically conducted by independent consultants. Contact Michigan Main Street to learn more about how to bring these additional services to your program.

MARKET ANALYSIS & RETAIL VIABILITY ASSESSMENT

Market analyses and retail viability assessments allow for a deeper understanding of local and regional economic and retail trends impacting communities, helping programs set the framework for future retail enhancement strategies. These studies also provide an opportunity to engage with local business owners and real estate professionals, helping Main Street staff build key relationships and better understand how market forces are being felt on the ground.

SALES GAP ANALYSIS

A sales gap analysis, also called a leakage analysis, measures the degree to which a commercial area is capturing retail demand in its surrounding area. For example, if a city's downtown had a leakage rate of only 5% for hardware stores, that would mean that it is almost completely capturing nearby demand. This helps paint a clear picture of how a commercial area can retain existing customers, attract new visitors, and better serve the needs of the local community. Often Leakage Analysis can be part of a Market Analysis for your Main Street. If you hire a consultant to conduct a Market Analysis, ask them to include this Leakage Analysis to help you get a better understanding of where residents and customers are spending their money.

RETAIL COMPETITIVE ADVANTAGES & RETAIL BROKER PITCH SHEET

When attracting new businesses or retaining existing ones, knowing your area's strongest competitive advantages, and having the data to support them, is an invaluable tool. Having concise "pitch sheets" on-hand, ready to give to retail brokers or prospective business owners considering a move to your district, can be the difference between a vacant storefront being filled or not.

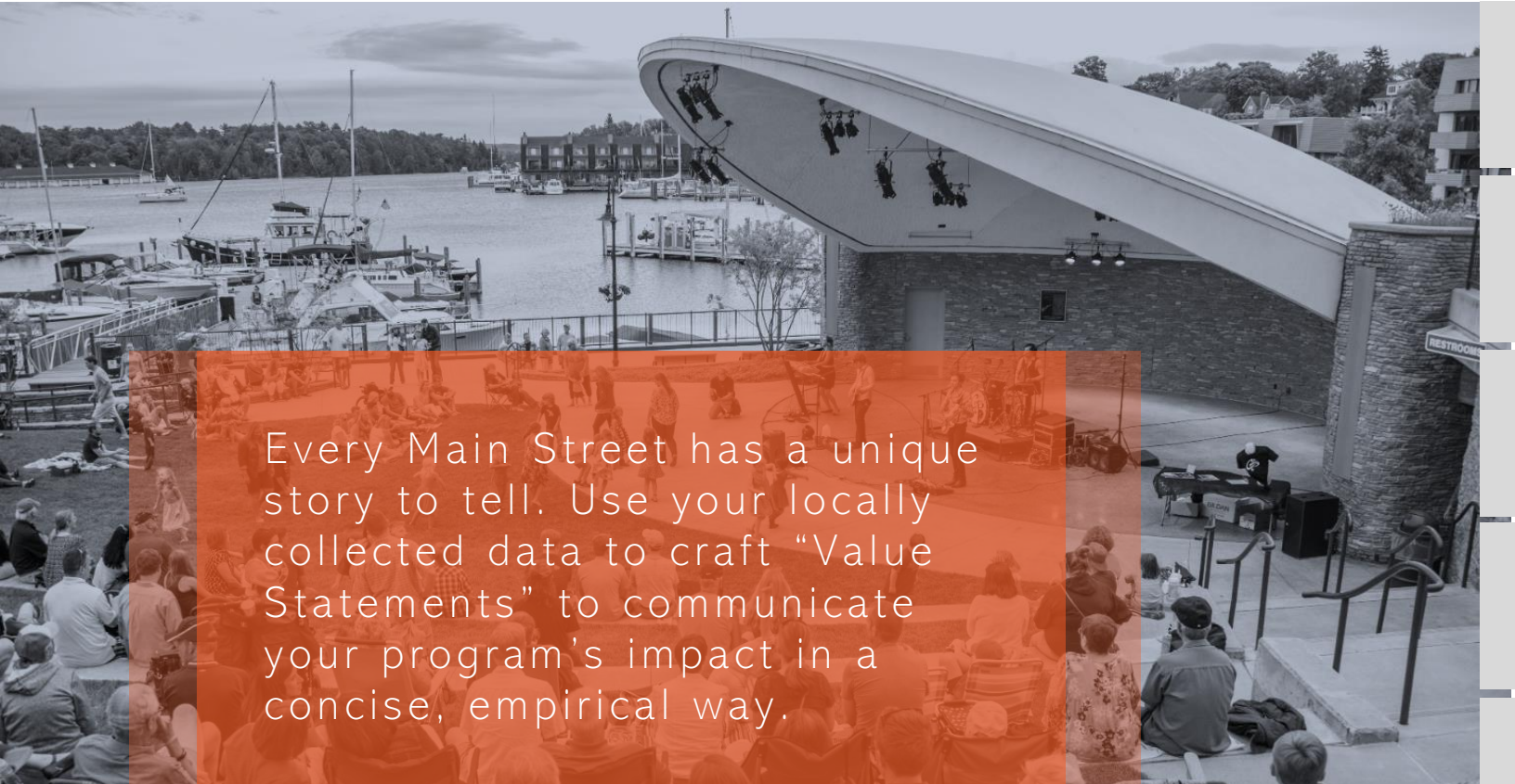


LOOKING FOR MORE INFORMATION? Check out National Main Street Center's recent publication "*Market Analysis for Community Transformation: A Practitioner's Guide*".

AVIATOR
JAYNE

Lifestyle • Home Goods • Furniture • More

Value Statements



Every Main Street has a unique story to tell. Use your locally collected data to craft “Value Statements” to communicate your program’s impact in a concise, empirical way.

Consider using the following fill-in-the-blank Value Statements as a framework to craft statements that align with your program’s strategic objectives and historical data. Keep in mind that the specific length of time referenced in your value statements will vary depending on your historic data.

**EACH TYPE OF COLLECTED DATA HELPS
COMMUNICATE THE VALUE OF YOUR MAIN STREET:**



BUILDING & PROPERTY

Communicates the physical characteristics of your Main Street and demonstrates the physical improvements the Main Street helps create.



ACTIVITY & USE

Highlights the vibrancy and character of your Main Street Area.



EMPLOYMENT

The number of jobs your Main Street helps support can quantify the economic and fiscal impact of your program.



HOUSING

Demonstrates your community is a place to *live*, work, and play.



INVESTMENT

Shows the value your Main Street brings to the community and quantifies the amount of investment into your Main Street.



MAIN STREET

Highlights stakeholder involvement and the activity Main Streets generates.

USE PROPERTY TAXABLE VALUE DATA
TO DEMONSTRATE INCREASED VALUE.

The property value of _____ (name of downtown)
increased ____% over the past ____ years.

Our Main Street program works directly with property owners and businesses to help increase the value of our downtown. This means more fiscal revenue for our town and a more resilient community.

USE BUILDING DATA TO COMMUNICATE
MAIN STREET COVERAGE AREA.

Our Main Street provides support and assistance to ____ (#) of
storefronts in downtown _____ (city name).

These storefronts help attract customers to our local businesses and improve the vibrancy of our downtown, making our Main Street a thriving place to eat, shop, and play.





_____ Main Street supports the development of our downtown businesses, creating a more vibrant and economically resilient place.



_____ (#) businesses have opened on our Main Street over the past ____ years.



_____ % decrease in vacancy since [insert year].



_____ (#) businesses have expanded over the past ____ years.

USE ACTIVITY & USE MIX DATA TO HIGHLIGHT COMMERCIAL DIVERSITY

Our downtown offers a little something for everyone.

With ____ retailers, ____ eating and drinking establishments, ____ service businesses, and ____ arts and cultural spaces, downtown ____ features a vibrant mix of commercial activity.





USE EMPLOYMENT DATA TO DEMONSTRATE LOCAL ECONOMIC GROWTH

Our program helped restore confidence in downtown as a great place to live and do business.

Since _____ [year] our district has seen a ____% increase in new jobs, creating more economic opportunities for local residents.



_____ Main Street helps support
small business growth and job creation in
our community.



Since [insert year]:

_____ Full-Time Jobs



_____ Part-Time Jobs

USE HOUSING UNITS TO SHOW COMMITMENT
TO YOUR COMMUNITY.

Take off your coat and stay awhile!

_____ (#) of households who have purchased new or renovated housing units in our
Main Street since _____ (year).

**With _____ (#) units of new housing, downtown _____ is
becoming a better place to shop and live.**

USE HOUSING UNITS TO HIGHLIGHT LOCAL
CUSTOMERS TO BUSINESSES.

**With _____ (#) of new housing units, businesses in our Main Street
are enjoying a growing local customer base.**

More nearby customers often leads to higher customer traffic and more frequent
customers – making our downtown an even better option for your business.





**USE RENOVATIONS AND IMPROVEMENT DATA TO
SHOWCASE INVESTMENT IN YOUR MAIN STREET.**

Our Main Street continues to become a more attractive community.

Since _____ [year], our Main Street has seen _____ (#) of public improvement projects,
_____ (#) of façade renovations for our downtown buildings, _____ (#) of
renovations, and _____ (#) new buildings.

**USE BUSINESS, EMPLOYMENT, HOUSING &
PRIVATE INVESTMENT DATA TO DEMONSTRATE
LOCAL ECONOMIC GROWTH**

**Our program helped restore confidence that downtown as a great
place to live and do business.**

Since _____ [year] our district has seen a ____% increase in private investment, with
_____ new businesses, _____ new jobs, and _____ new or rehabbed housing units.



**Since [insert year], a total of \$ _____
have been invested in our Main Street area.**

\$ _____ Private Investment

\$ _____ Public Investment



_____ Main Street programming engages residents and cultivates a vibrant downtown atmosphere.

Since [insert year]:



_____ Volunteer Hours



_____ Events



_____ Event Attendees

USE EVENT DATA TO SHOWCASE DOWNTOWN VIBRANCY.

_____ Main Street is helping make downtown _____ a fun place to be!

In [year], _____ Main Street organized ____ [number of events], attracting over ____ [number of event attendees] to downtown _____, boosting local business sales and creating a welcoming downtown atmosphere.

USE VOLUNTEER DATA TO ILLUSTRATE COMMUNITY BUY-IN.

Our program's ground-up approach to economic development lets community members help shape the future of their downtown.

Since [year], volunteers have spent ____ hours helping support local businesses and making their downtown a better place to live.

Index

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<i>Office</i>	20	<i>Event Expenses</i>	50
<i>Civic Uses</i>	20	<i>Event Revenue</i>	50
<i>Places of Worship</i>	20	Fundraising	49
<i>Automobile</i>	20	<i>Earned</i>	49
<i>Warehouses</i>	20	<i>In-Kind</i>	49
<i>Manufacturing Industries</i>	20	<i>Private</i>	49
<i>Arts & Cultural</i>	20	<i>Public</i>	49
<i>Vacant</i>	20	Investment	38-44
Apartments (Lofts).....	33-37	<i>Private</i>	40-44
Assessed Value (SEV)	12-13	<i>Public</i>	40-44
Buildings (Total)	14	Main Street Data	45-51
<i>Total Buildings</i>	14	New Construction	42-43
<i>Over 1-Story</i>	14	Owner-Occupied Units.....	33
<i>Rehabilitations</i>	14	Private Investment	40-44
<i>Sales</i>	14	Professional Development	48
Businesses (Total)	18	Public Improvements	40-41, 43
<i>New</i>	23	Public Investment	40-44
<i>Closed</i>	23	Rehabilitated Units	36-37
<i>Expanded</i>	23-24	Renovations	36
<i>Contracted</i>	23-24	Rent (Market)	15
<i>Relocated</i>	23	<i>Retail Rent</i>	15
Condominiums	33-37	<i>Office Rent</i>	15
		<i>Residential Rent</i>	15

Renter Occupied Units	33-34
Residential Units	33-37
<i>Owner-Occupied</i>	33-34
<i>Renter-Occupied</i>	33-34
Single Family Houses	33-37
Staffing	47
<i>Benefits</i>	47
<i>Executive Director</i>	47
<i>Full-Time</i>	47
<i>Part -Time</i>	47
<i>Salaries</i>	47
Storefronts	14
Square Footage	12-13
<i>Square Footage of Buildings</i>	12-13
<i>Square Footage of First Floors</i>	12-13
<i>Square Footage of Upper Floors</i>	12-13
Taxable Value	12-13
Training	48
Underutilized	17-18, 20
<i>First Floors</i>	17-18, 20
<i>Upper Floors</i>	17-18, 20
Upper Floors	11
<i>Buildings</i>	12-13
<i>Housing</i>	33-34
<i>Underutilized</i>	18-19, 21
Vacant	20
Volunteers	48
<i>Board Hours</i>	48
<i>Committee Hours</i>	48
<i>Cost</i>	48
<i>Event Hours</i>	48



PREPARED FOR

Michigan Main Street Program
Michigan Economic Development Corporation
300 N. Washington Square
Lansing, MI 48913

PRODUCED BY



Jon Stover & Associates
1718 ½ Florida Avenue NW
Washington, DC 20009
www.stoverandassociates.com

MainTM 5

Comprehensive Communication Planning

Charlevoix



Donors

Sponsors | Donations | Members | Investors | Planned Giving

Donors are those who choose to give of their resources to support the organization and their community. Donors have many different motivations. Remember you are not your audience. Create messaging that will connect with the value of the organizations and the motivations of the donors. It is OK for donors to have selfish motives.

What is the value of Main Street?

- Continue to help grow and drive business into the community
- Love and pride of community
- Sustaining a strong downtown for residents and visitors to enjoy
- An avenue for a donor to create and leave a legacy
- "You can be a difference maker"

How can we share the value of Main Street?

- o Current atmosphere of donor fatigue and competition
- o Most events are funded through their own individual sponsorships
- o Current sponsorship is case by case/committee by committee
- o Create an annual giving campaign that includes all sponsorship opportunities (events, committee projects, infrastructure/development, etc) for the entire year, Include multiple giving levels. Use multiple channels
- Text messaging and/or Charlevoix Main Street App alert
- Sponsorship Brochure
- o Outreach to residents and seasonal residents through an Annual Sustaining Membership Campaign
- o Show impacts and results of the work Main Street is doing Downtown through use of measureable metrics to continue to grow and drive donations
- o Crowdfunding for back alley improving project – Sustainable Built Environment Initiative
- o Use business community as ambassadors for downtown and the Main Street Program

How can we measure our efforts?

- Monetary value of donations
- Number of contributors
- # of Downtown businesses or DDA businesses that contribute to the program; but more importantly, # of Downtown Businesses or DDA businesses that are connected/engaged in the program
- Maintain # of pledges

To Whom do we need to do a better job?

- Seasonal residents
- Family foundations
- Churches
- Vacationers
- Community Clubs

Owners

MainTM 5

Business Owner | Property Owner | Building Owner | Developer

Owners have a vested interest in the outcome of any investment downtown. Downtown Business Owners put on an event every day, on their own dime. Remember you are not your audience. Create messaging that will connect with the value of the organizations and the motivations of the owners. It is OK for donors to have selfish motives.

What is the value of Main Street?

- Continue to increase profits
- A vibrant healthy downtown will help businesses to attract employees and customers and help the community attract new entrepreneurs/investors
- Enhance the quality and sustainability of new businesses, reducing business turnover

How can we share the value of Main Street?

- Continue Façade Grant Program
- Survey business owners annually to discover wants/needs and gather feedback about Main Street
- Continue business owner meetings
- Continue support for new business owners

How can we measure our efforts?

- Business Support during Events
- Enhanced Communication with Property Owners
- Retail events – activation of Downtown vs. fundraising

To Whom do we need to do a better job?

- Restaurant Owners
- Property Owners
- Realtors

Public

Customers | Citizens | Event -Goers

The Public, in general, has dismissed the district. They have created new retail habits that don't include downtown. Your message should be disrupting. Make them feel like the place they think they know is unknown. Play off the emotion of not being left out. You can't just lead them to water. You must teach them to drink. And then convince them that the drink will be good again next week. Remember you are not your audience.

MainTM
5

What is the value of Main Street?

- Vibrant downtown with many activities year-round

How can we share the value of Main Street?

- o Regional and national media coverage to draw people to visit
- o CVB promotions of community using downtown as a main marketing point
- o Promotions committee – promoting year-round events and businesses – Charlevoix as a destination and place of activity
- o Charlevoix is Open – Winter campaign
- o Focus on promoting all winter activities to draw visitors in
- o Promoting young leadership, entrepreneurs, investors, etc. to draw more young families

How can we measure our efforts?

- Increase in shoulder-season visitors/sales
- Increase in visitors from different areas
- Increase in revenues

To Whom do we need to do a better job?

- Promoting to the young families/millennials
- Promoting Main Street to the year-round residents

Volunteers

Board | Committees | Events | Service | In-kind

Volunteers tend to be scared of long-term commitments. We tend to see someone who is willing to help on an event, and pounce on them. Force them to join a committee. Then burn them out. Consider Single Serving Service. Give opportunities for people to get involved on their terms. And keep things fun. Remember you are not your audience.

What is the value of Main Street?

- Encourage community participation
- Community connectedness
- Grassroots involvement in the shaping of the future of downtown

How can we share the value of Main Street?

- Current dynamic of volunteer fatigue
- Voluntary volunteer program – do not try to upsell volunteers
- Develop a volunteer database and volunteer recognition to entice volunteers to participate
- Document volunteer needs in detail within work plans
- Develop volunteer management with targeted volunteer opportunities over general volunteer asks – identify needs, create job descriptions, match volunteers
- Utilize Maestro to manage volunteers
- Follow-up on initial pledge forms

How can we measure our efforts?

- Increased continuity of volunteers

To Whom do we need to do a better job?

- Community groups
- United Way volunteer database
- Larger employers
- Seasonal residents

Government

MainTM 5

Mayor | Council | Commission | County | BID Board | Chamber | CVB | Agencies

Volunteers tend to be scared of long-term commitments. We tend to see someone who is willing to help on an event, and pounce on them. Force them to join a committee. Then burn them out. Consider Single Serving Service. Give opportunities for people to get involved on their terms. And keep things fun. Remember you are not your audience.

What is the value of Main Street?

- Collaboration on key, catalytic projects downtown
 - Main Street is the avenue through which community members can make a change in their community and drive the future of the community/downtown
 - Main Street is working to make downtown more vibrant and prosperous through engaging community members, business owners and key stakeholders – all of your constituents
- The health of downtown affects the health of the entire community

How can we share the value of Main Street?

- Communication to City Council through attending meetings (find correct frequency to attend meetings) and sending more formal reports
 - o Have executive director present, but also have committee chairs and Board members present
 - o Continue to summarize input received from constituents in all wards

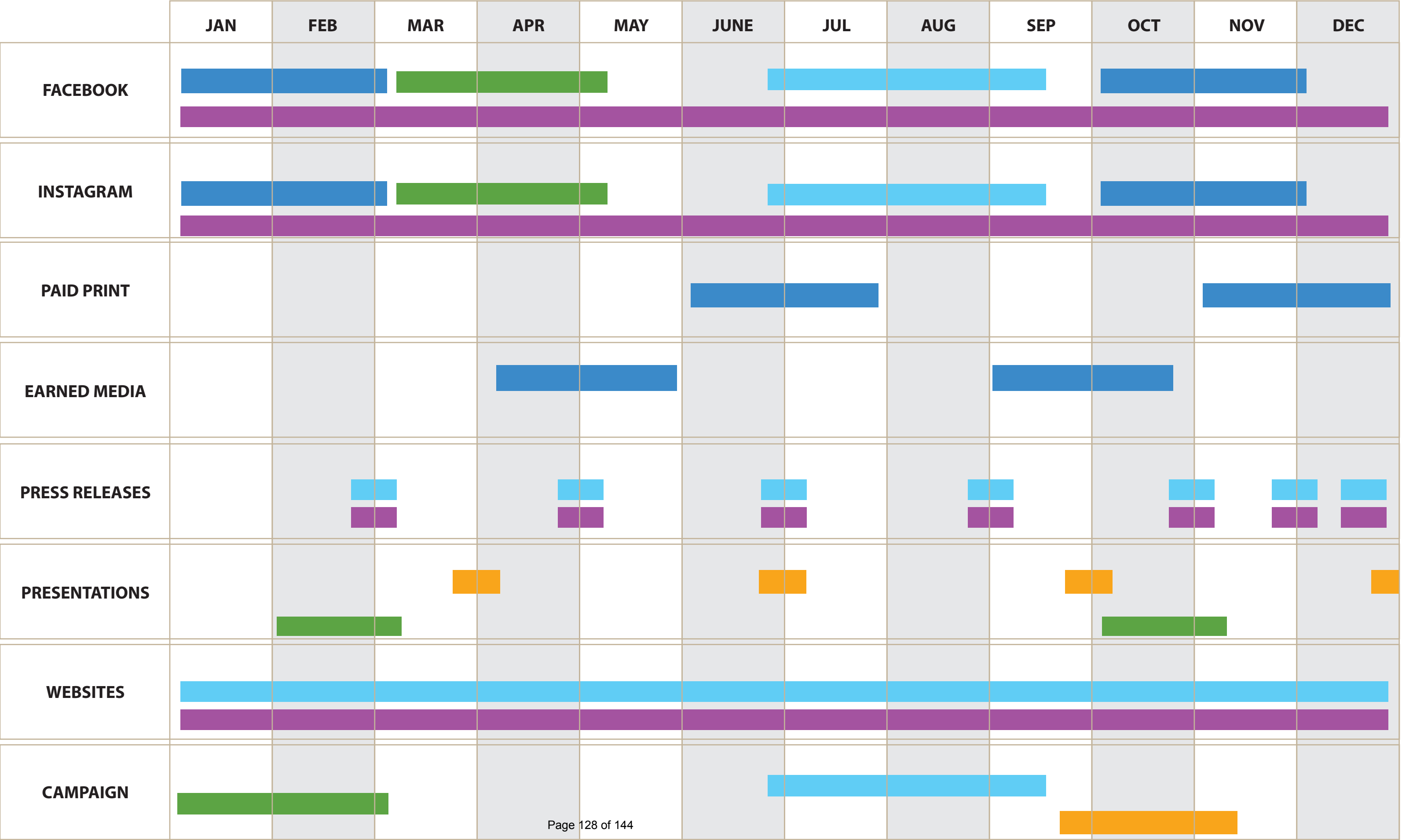
How can we measure our efforts?

- Collaborative projects
 - o Implementation of SBEI alley projects

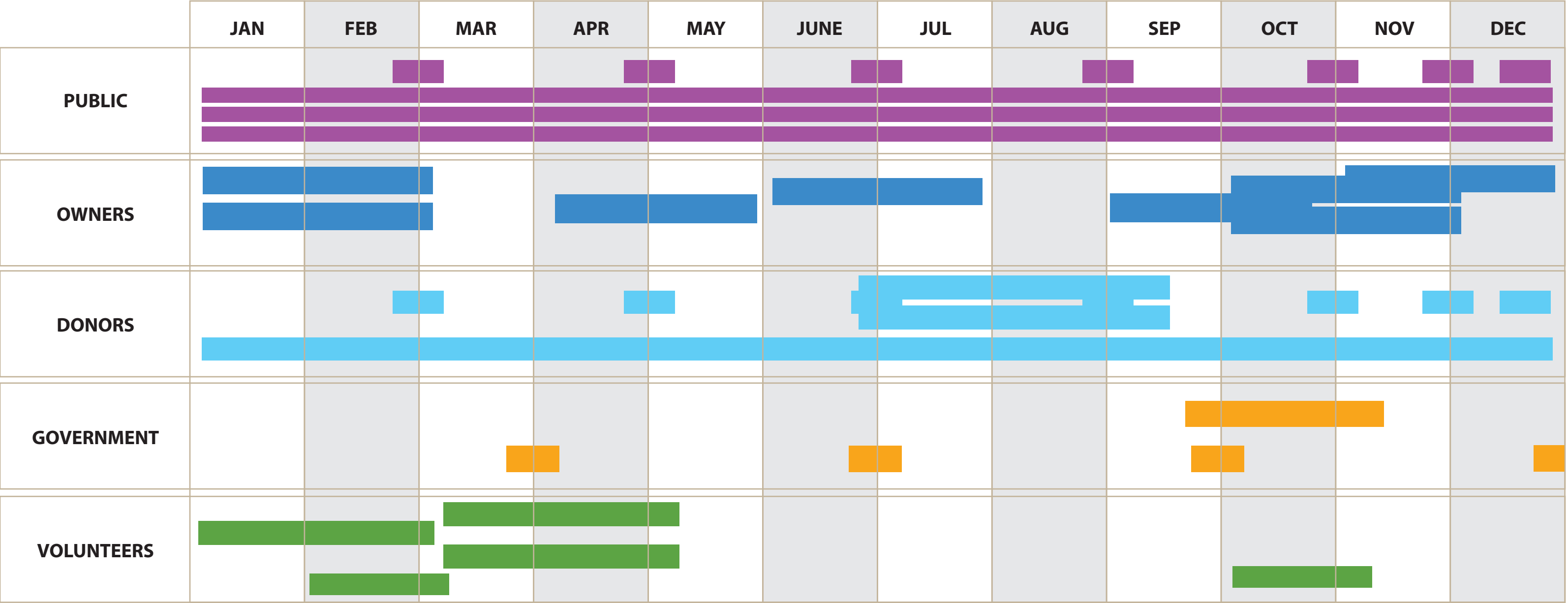
To Whom do we need to do a better job?

- Surrounding Township
- County
- MDOT

2019 Main 5 Communication Map



2019 Main 5 Communication Map



DDA/Main Street Board
210 STATE STREET CHARLEVOIX , MICHIGAN 1 49720
Charlevoix Main Street DDA
(231) 547-3257 lindseyd@cityofcharlevoix.org

Old Business

TITLE: Main Street Board Assessment

DATE: August 27, 2018

PRESENTED BY: Lindsey Dotson, Executive Director

BACKGROUND:

This Board performance self-assessment is intended to help you identify the foundational strengths of the Main Street Board and Main Street Organization and to prioritize opportunities for the coming years. Not only will the responses to this survey provide a way for the Board to identify future technical assistance and training support needs, but it will also provide a baseline to measure progress over time on these foundational criteria for Board members and the entire Main Street Organization. The intent of this tool is that it be used annually to re-assess progress and priorities, offering a consistent way to measure success and recognize your most important priorities for on-going Board development.

ATTACHMENTS:

- ▣ Master Board Assessment - 2018

MASTER COPY

● good

● - needs improvement

● - need to address

PART ONE: MAIN STREET BOARD AND ORGANIZATION SELF ASSESSMENT TOOL

This Board performance self-assessment is intended to help you identify the foundational strengths of the Main Street Board and Main Street Organization and to prioritize opportunities for the coming years. This tool will be used to guide decision-making for future technical assistance and trainings. It also provides an opportunity for your Main Street Board to prioritize your Board development activities.

Please read each criteria statement and select the most appropriate response. Please complete and return your self-assessment to: _____ by: _____

Criteria	Yes, and meets organizational needs.	Yes, and needs improvement to meet organizational needs.	No; does not meet organizational needs.
COMPOSITION AND RECRUITMENT			
The Board represents a diversity of skills, community stakeholders, previous Board experience and tenure on the Board.	x x x x x		
There is a clear and demonstrated understanding of who is responsible for recruiting and processing potential Board members.	x x x x	x x - clarification needed - could be more board/ cmte involvement	
The Board pro-actively identifies and maintains a pool of qualified, potential members.	x x	x x x unsure of pool of applicants	x the board does not select, mayor appointed
Board tenure is limited to ensure a steady supply of new Board members and the addition of new perspectives into the organization.	x x x x x recently the case		x
Tools and systems such as a Board Member Profile, Board Member Composition Matrix, and Board Member Application exist and are utilized to accurately track Board member tenure and guide recruitment planning.	x x	x x x these exist, not sure about their use needs improvement	x not that I am aware of
COMMITMENT, ORIENTATION AND TRAINING			
All current and potential Board members understand and are willing to commit to the duties and responsibilities of serving on the Main Street Board. This is demonstrated through such actions as members signing an Annual Letter of Commitment that outlines the expectations and responsibilities of Main Street Board members.	x	x x x x - agree in theory, but we aren't signing letter - do we have a letter of commitment?	x
Minimum attendance requirements for Board meetings exist and are collaboratively enforced by the entire Board.	x x x x		x x These exist but are not enforced
Board orientation and development activities begin immediately and continue throughout the tenure of every Board member. This is demonstrated in part by the Board Member Handbook/ Packet provided to each member.	x x	x x	x x Much improvement needed

*

*: denotes tie / no obvious majority & needs to be discussed

Initial orientation includes at a minimum, a comprehensive introduction to and understanding of the Main Street District (map and boundaries), the funding structure, and the Main Street Four-Point Approach.	x x x	x	x much improvement needed
All Board members actively participate in a minimum number of training and continuing education opportunities, on an annual basis.		x x x x standards need to be set and met	x x
ORGANIZATIONAL STRUCTURE			
If applicable, an Executive Committee exists and performs specific and clearly understood functions designed to handle matters during and between meetings.	x x	x x x it exists but doesn't always perform per standards chairman handles most	x
There is a clear and demonstrated understanding of the role of the Main Street Executive Director and his/her relationship with the Main Street Board.	x x x x x		
The Executive Director is evaluated on an annual basis, based on performance criteria aligned with an outlined description of duties and the Main Street Organization's strategy(ies), goals and measures of success.	x x	x not sure?	x x x not sure - reviews are not shared with board
A committee or project team structure exists to support the implementation of Board-defined strategy(ies.), goals and measures of success through the development of work plans led by volunteers	x x x	x x x	
All Board members increase organizational capacity and demonstrate leadership through actively participating on committees/project teams. Minimum participation requirements are established and enforced at the Main Street Board level.	x x x x	x x	
BOARD AT WORK			
The by-laws are current and accurately reflect the procedures by which the Board transacts its business.	x x x x x		
Every Board member understands and participates in the process of developing effective policies to address genuine organizational needs.	x x x x x	x	
The organization has developed, documented and enforces the following core policies: - Conflict of Interest - Code of Ethics - Whistleblower - Financial Policies & Procedures - Safety - Employee Relations	x x x	x x	x

The Main Street Organization's Mission, Vision and Strategic Direction are defined, understood and demonstrated by each Board member.	x x x x	x x	
There are processes designed and implemented to ensure a consistent and productive Board culture. These are demonstrated by our mission, vision and values statements and our performance monitoring and evaluation systems, among others.	x x	x x x x	
The Board regularly assesses its performance and implements improvement plans accordingly. This is demonstrated in part by completing an annual self-assessment and developing a supporting plan of technical assistance and training.	x x	x x x annual education might help	x seems like its beginning now though
Board meetings and meeting agendas are designed and conducted for maximum productivity and compliance with legal obligations, e.g. Open Meetings Act. All decisions are made in Board meetings that are open to the public.	x x x x x x		
Board meeting minutes are documented and recorded to reflect attendance, agenda items, Board actions and tabled items.	x x x x x x		
The internal communication flow between Board members, the Executive Director and committee/project team participants is defined and clearly understood by all participants.	x x x x	x x communication plan should help with this	
All Board members are willing and able to communicate the mission and work of the Main Street Organization with the public and key stakeholders, and do so in a cohesive and unified manner.	x x x x x	x	
The Main Street Organization recruits and maintains a qualified volunteer base sufficient to accomplish its goals.	x	x x x room for improvement	x x need to recruit new volunteers
There is an active structure in place to appropriately develop the capacity of volunteers, including a leadership pipeline (i.e. facilitating the development of a volunteer from the level of a task volunteer to project/team lead and eventually to Board Member).	x x	x x	x x hopefully coming soon
The Board determines an appropriate financial structure and oversees the financial management of the organization.	x x x x x	x would like to see more detailed budget and financial practices	
The Board identifies and secures adequate financial resources for the organization to fulfill its mission and programming.	x x x x x		x procurement of funding has not been a goal

DDA/Main Street Board
210 STATE STREET CHARLEVOIX , MICHIGAN 1 49720
Charlevoix Main Street DDA
(231) 547-3257 lindseyd@cityofcharlevoix.org

Old Business

TITLE: Logo Trademark & License Agreement Pricing

DATE: August 27, 2018

PRESENTED BY: Lindsey Dotson, Executive Director

BACKGROUND:

After several phone meetings with Traverse Legal, PLC about trademarking the new Charlevoix logo the following figures are what we would pay:

- \$1300 for an "in use" based trademark with one class of services to 'promote economic development, tourism, and recreation'
- \$2,000 to \$2,500 to have a form/template trademark license agreement prepared that can be modified/customized for our specific needs with various different parties

RECOMMENDATION:

Motion to approve expenses not to exceed \$4,000 related to applying for a trademark of the new Charlevoix logo and having a trademark license agreement template prepared by Traverse Legal, PLC.

DDA/Main Street Board
210 STATE STREET CHARLEVOIX , MICHIGAN 1 49720
Charlevoix Main Street DDA
(231) 547-3257 lindseyd@cityofcharlevoix.org

New Business

TITLE: Facade Grant Award Recommendation

DATE: August 27, 2018

PRESENTED BY: Lindsey Dotson, Executive Director

BACKGROUND:

On August 2nd the Design Committee met to review 3 applications (abbreviated versions attached) for the Facade Grant Incentive Program using the new rating guidelines. Applications were submitted for 115 Bridge Street (Simonsen's & Panache), 108 Van Pelt (True North), and 120 Michigan Ave (Hotel Earl). Based on an overwhelming majority the Design Committee is recommending that the project at 115 Bridge Street be funded in the amount of \$6,287.50 after receiving a score of 40 (other scores were 33 and 24). The project got a high score based on the fact that it has received a Design Consultation from us/Michigan Main Street, restores a more historic look to a historic building that's integrity has been sacrificed over the years, and the high impact and visibility of the project.

RECOMMENDATION:

Motion to award 115 Bridge Street with a reimbursement grant in the amount of \$6,287.50 upon completion of the project and proof of payment, leaving \$3,712.50 to be awarded during the 2nd grant application cycle.

ATTACHMENTS:

- ▣ 115 Bridge Street Application
- ▣ 108 Van Pelt Application
- ▣ 120 Michigan Avenue Application



Score: 40

Charlevoix Main Street Façade Incentive Grant Program Application

Applicant's Name: Richard Lobenhertz Phone # 231-675-6285
Business Name Simonsen's Bakery & Panache'
Property Owner's Name 115 Bridge Street LLC
Project Address 115 Bridge St. Charlevoix, MI 49720
Parcel # 052-242-002-15
Mailing Address (Applicant) 203 Bridge St.
Charlevoix, MI 49720

The work to be performed in connection with the Charlevoix Main Street DDA 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 \$ 12,575.00

Incentive Amount Requested \$ 6287.50

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

New Color Scheme for 115 Bridge Street

The following pages contain two options for new color schemes for your building. Both options follow a few basic design guidelines for traditional storefronts:

Brick

Brick does not need to be painted for protection and if not properly maintained, paint can cause brick deterioration. Because your brick is already painted, you have two options:

- Strip the paint chemically. This will have a large upfront cost, but then lower continuing maintenance costs as you will only pay for periodic masonry repointing.

OR

- Repaint the building. This will have a lower upfront cost, but a frequent continuing maintenance cost. It is important to keep the paint in good shape as peeling and cracking can allow water to seep into your brick and become trapped behind the paint, causing brick deterioration problems. I recommend repainting your brick with a color that approximates natural brick.

Trim

Currently the building's façade is all one color, hiding the building's detailed trim elements. Painting the wooden trim elements on your façade contracting colors helps to highlight unique and character-defining elements.

Awning

Both color schemes incorporate the building's existing striped navy canvas awning

Sketch colors are approximate and vary due to monitor and printer differences.

Choose colors you like by comparing manufacturer paint chips in daylight before purchasing paint

Option A

This option uses a traditional red brick color for the brick walls and cool gray and dark gray/blue for the trim accent colors.

Option B

This option uses a clay orange/brown color for the brick walls and cream and brown for the trim accent colors. This color may be closest to the original color of the brick on this building, although it was hard to find any exposed brick (good job keeping your paint maintained!)

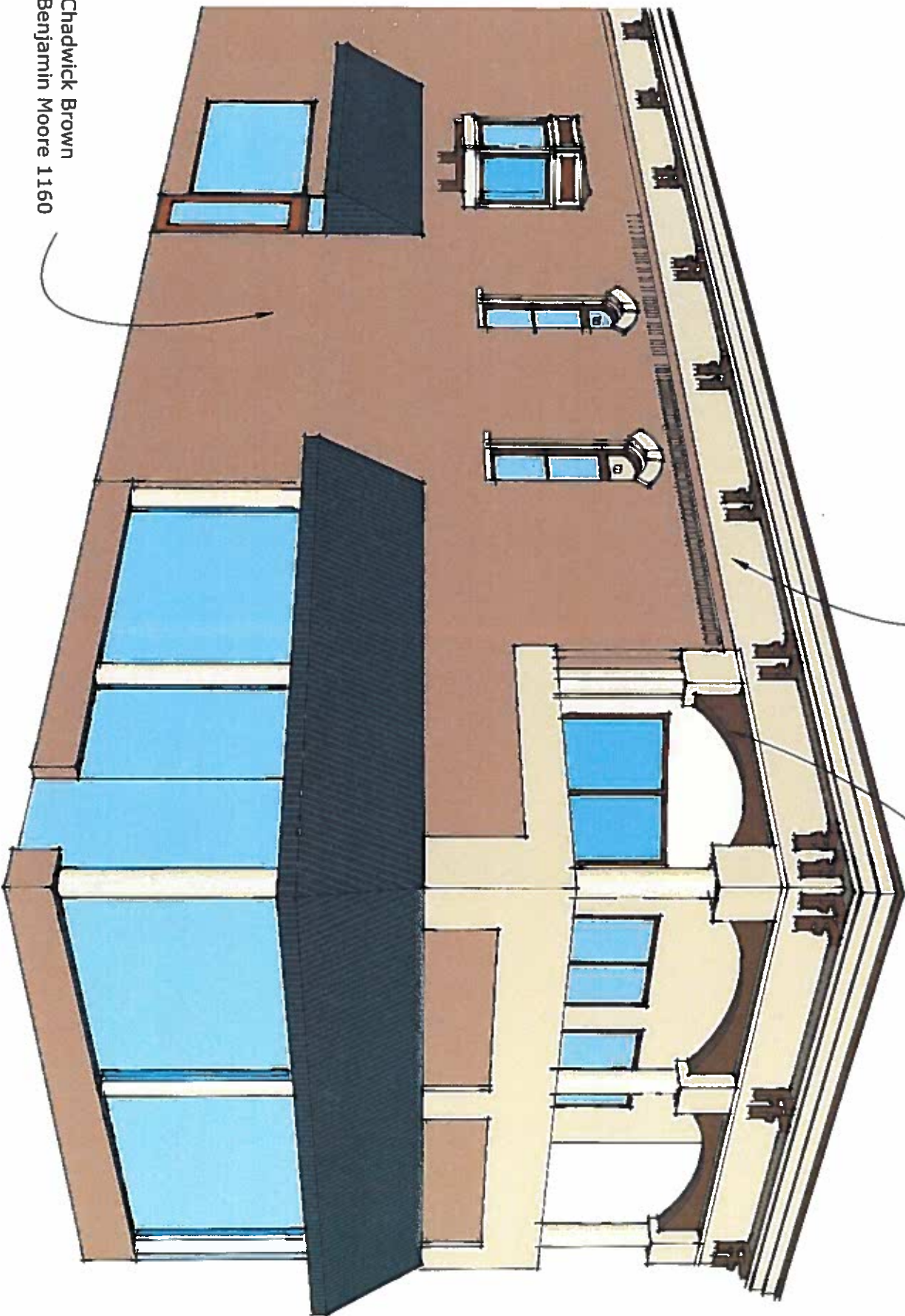


Option B

Windham Cream
Benjamin Moore HC-6

Hasbrouck Brown
Benjamin Moore HC-71

Chadwick Brown
Benjamin Moore 1160



Option B



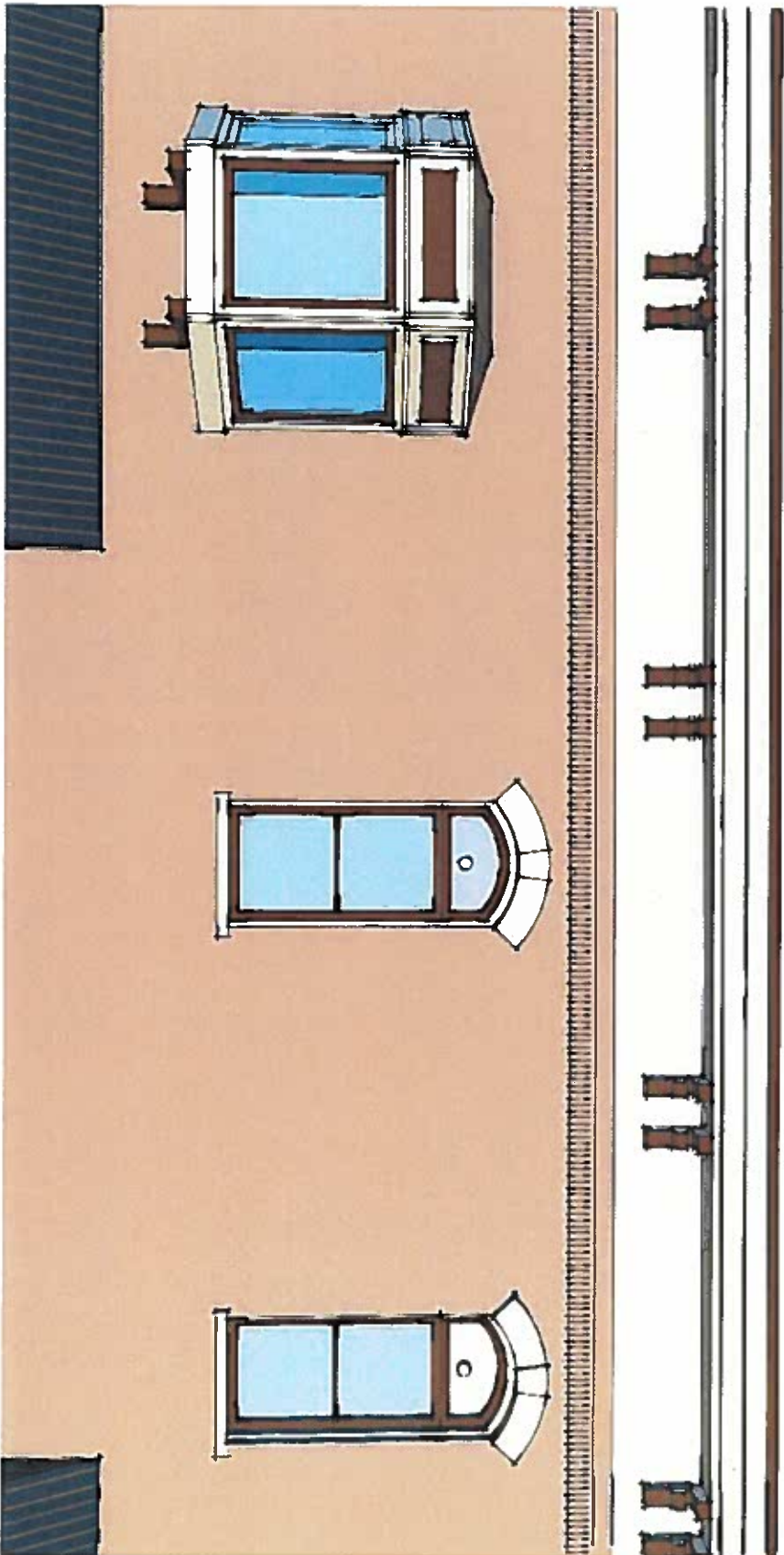
Chadwick Brown
Benjamin Moore
Classic Colors
1160

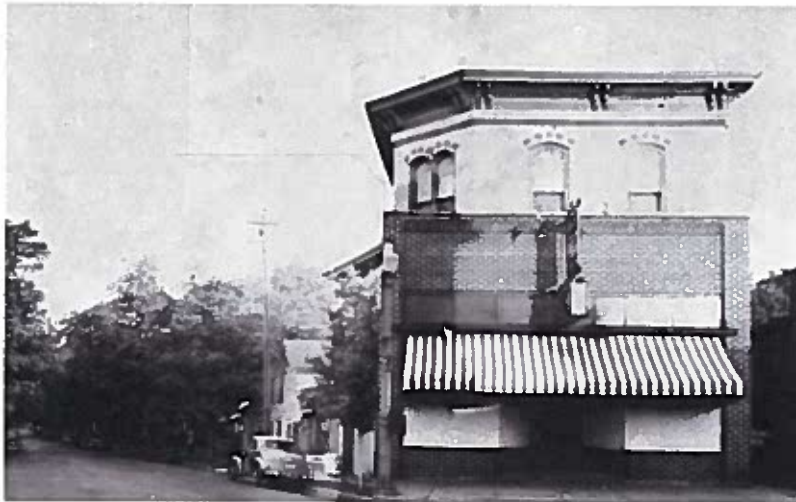


Windham Cream
Benjamin Moore
Classic Colors
HC-6



Hasbrouck Brown
Benjamin Moore
Classic Colors
HC-71







Charlevoix Main Street Façade Incentive Grant Program Application

PHASE II SPRING 2015

Applicant's Name: RON WAY Phone # 231-675-7764
 Business Name Stueycroft farms LLC
 Property Owner's Name Ron Way
 Project Address 108 VAN PELT
 Parcel # 8
 Mailing Address (Applicant) 05768 BARNARD Rd
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) new Siding & trim

Façade(s) Impacted (check whichever applies)

☒ Front ☒ Rear ☒ Side ☐ Corner lot

Total Cost of Improvement \$ 18,170.04 14,885

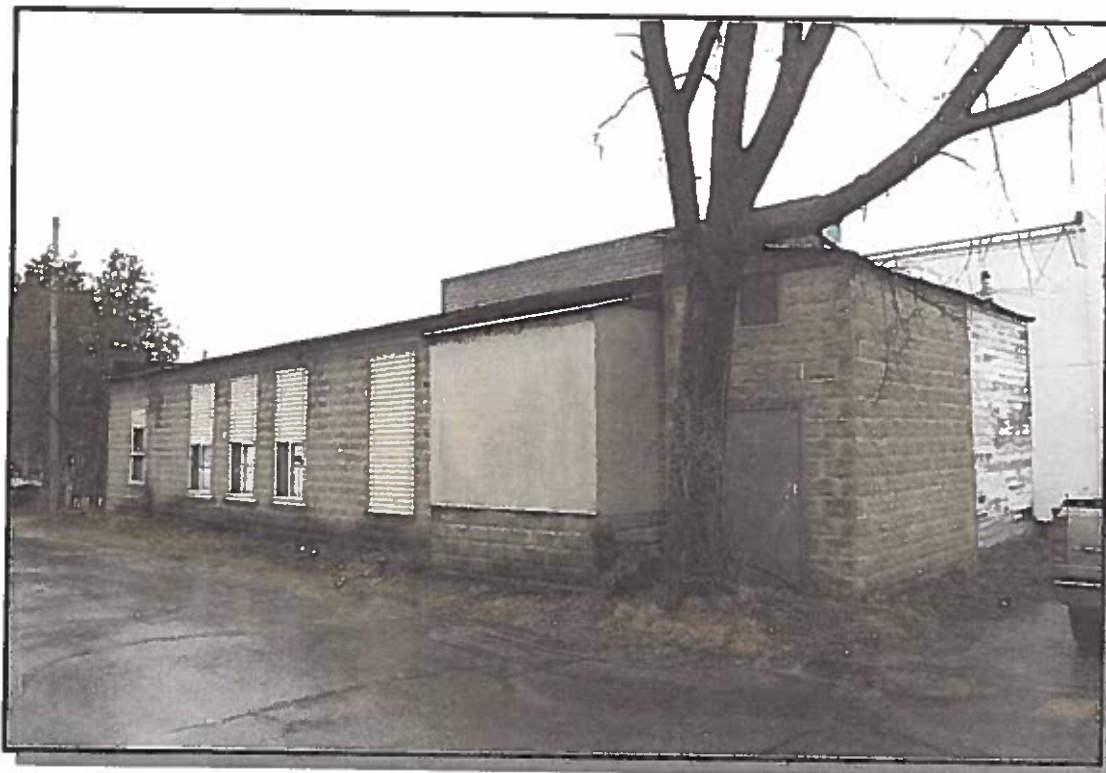
Incentive Amount Requested \$ 9,085.00 7,442.50

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

1. Project Improvement Plans drawn to scale, if applicable



Rear Elevation Facing NW



Rear Elevation Facing NE



Charlevoix Main Street Façade Incentive Grant Program Application

Applicant's Name: TERROD CLEMENT Phone # 248-666-7779

Business Name HOTEL EARL

Property Owner's Name PAUL SILVA

Project Address 120 MICHIGAN AVE

Parcel # 15-052-199-000-00

Mailing Address (Applicant) 120 MICHIGAN AVE

CHARLEVOIX, MI

The work to be performed in connection with the Charlevoix Main Street DDA 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 \$ 3,636,506.14

Incentive Amount Requested \$ 10,000⁰⁰

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

