

OREGON MAIN STREET



DEVELOPING A STRATEGIC PLAN TEAM WORKBOOK

OVERVIEW

Since 2008, Oregon Main Street has been assisting communities to sustain and enhance their historic downtowns and traditional commercial districts using the nationally recognized Main Street Approach™ developed by the National Main Street Center. Communities participating in our Network are united by their tireless dedication to create vibrant, people-centered places to live, work, and play.

One of the keys to successful efforts is to have a vision for how the community would like to see their historic core look, feel, and function, and to develop a strategic plan to guide local decision making. Main Street-style transformation is a combination of art and science: communities first need to learn about the local economy, its primary drivers, and its regional context (the science), but they also need to convey that special sense of place through storytelling, preserving the older and historic structures that set it apart, broad and inclusive civic engagement, and marketing (the art).

The strategic planning process helps set clearer goals for an organization and a road map on how to achieve those goals. This usually includes a mixture of stakeholder involvement, reviewing market data, and looking at previous, relevant planning studies and reports. Through the strategic planning process, communities are encouraged to identify two to three overarching strategies the program will focus on and to use the Main Street Four Points in a more collaborative way to achieve the community's vision for the downtown or traditional commercial district.

THE DEVELOPMENT OF A STRATEGIC ACTION PLAN SERVES SEVERAL PURPOSES

- Establishes a community vision for success that is rooted in an understanding of the market realities of the district.
- Engages the community in establishing a community-wide agenda for downtown revitalization.
- Manages the wide range of activities an organization wants to accomplish through comprehensive, simultaneous activity in the Four Points.
- Leads to the development of a timetable and budget for activities.
- Explains the organization's purpose and its activities to the public.
- Helps demonstrate the impact and measurement of both qualitative and quantitative outcomes of the organization's success.

PROCESS

1. Assemble the team (Board of Directors forms the Team)

Identify who will participate in the process to create the action plan. Ideally, all board members will participate in parts of the process that aligns with their skills and interests.

Steps in the process will be assigned to the following roles:

- Executive Director- fully participates throughout the process and plays a key convener role
- Board of Directors - assignments based on areas of interest
- Board Strategic Planning Leads – lead the planning process in partnership with the executive director
- Identify Other Teams – identify other teams you might want to form, e.g., Community Engagement Team
- Advisory Team- may include key stakeholders, committee chairs, or other partners in downtown revitalization

Who will be the team leads for the process?

Who else should be invited on the team?



2. Assess your district (Executive Director & Strategic Planning Leads)

Take a critical look at the assets and liabilities of your district. This includes the physical assets/liabilities including the character and condition of the building stock as well as other assets/liabilities like a high degree of community volunteerism or lack of community pride. Some of the activities to undertake in assessing the district include:

- Form small groups of board members or interested volunteers to complete an assets and liabilities checklist – this is an exercise that is best done as a walk-through of the district.
- Review any recent plans, market studies, or other reports as applicable.
- Conduct an inventory of businesses and buildings. What goods and services are offered? What clusters do you naturally have emerging? What are the gaps?
- Identify all existing events that take place in the district or that attract a large audience to the community.

What previous plans, studies, and reports are important to review?

What market data exists and what do we need to collect?



3. Identify community engagement strategies. (Executive Director & Engagement Team)

A critical piece of the process is to engage your stakeholders in the process. This is useful for a variety of reasons including hearing what matters to stakeholders, identifying opportunities for enhancing your district, increasing awareness of the important role your district plays to the overall health of the community, and building long-term support from a variety of community members. Some of the steps to take include

- Have board members complete a board member survey. Have committees do the same.
- Prepare and distribute an on-line community survey.
- Host small group listening sessions and run through a series of questions about assets, opportunities, issues, and liabilities. Ask the groups to identify the top 5 qualities the district will have in the future – how will it look, feel, function? Look at other ways to build community engagement.

What small group listening session can we host?

What types of surveys should we use?

4. Review data, reports, surveys, and listening session information (Executive Director & Strategic Planning Leads)

Look for consistency in the top assets, issues, liabilities, and opportunities identified in the process of assessing your district. Cull out the most frequently mentioned assets/opportunities and liabilities/challenges from the reports, listening sessions, and surveys. This might be “our historic building stock,” or it might be “too many vacant spaces,” or it might be “upper-floor residential opportunities,” etc.

- a. Write the top assets/opportunities and liabilities/challenges on flip-charts in preparation for a work session with the team.
- b. Develop a draft vision statement for review at the work session.

What are our top assets?

What are our top issues?

What are our top priorities?

What are our top liabilities?

5. Finalize vision and strategies (Executive Director & Advisory Team)

Bring the Advisory Team together for work sessions. This is where it is helpful to include people in your community who are good at seeing the big picture. At the work sessions, review and discuss the information gleaned from the assessment. This can be broken up over 2 to 3 90-minute sessions.

- a. Review and fine tune the draft vision statement for the district.



What's our vision?

- b. Prioritize the top assets/opportunities and liabilities/challenges.
- c. Using this information, identify the top 2-3 strategies you will focus on over the next three to five years. These strategies should help provide focus to the revitalization effort and be based on achieving the vision.
- d. Develop specific objectives for each strategy – what steps do you need to take to achieve the strategy?

Proposed Strategy



What objectives will help us achieve this strategy?

1)

2)

3)



6. Share draft with board (Executive Director & Advisory Team)

Share progress and drafts with the full board for input.

7. Feedback from the community (Executive Director & Strategic Planning Leads)

Brainstorm community engagement opportunities to share your draft plan with the public and gather their feedback. This could include hosting a booth at a farmer’s market or community event, or doing targeted outreach to community groups to ensure inclusivity in your planning process.



Where can we share our plan in the community to gather feedback?

8. Committee Work sessions (Executive Director and Strategic Planning Leads)

Bring your committees together for work sessions. At the work sessions, review and discuss the information gleaned from the assessment. This can be broken up over 2 to 3 90-minute sessions.

- a. Committees need to look at opportunities to integrate the strategic plan into their scope of work. Current activities should be evaluated against the plan priorities, goals, and objectives. Are the activities consistent? If not, should they be continued, discontinued, or find another home for them. Do new activities need to be developed that are more in line with the strategies?

9. Identify Partners (Executive Director & Board)

Identify partnerships with other groups to maximize success. Working with others expands the community focus of the strategic plan and the revitalization effort.

- a. Make a list of every single community organization, agency, club and constituency that might conceivably be involved in the revitalization of your commercial district. The list should go beyond the “usual suspects” and encompass every public agency, civic group, school organization, religious group, business association and development authority imaginable. Consider informal groups as well – social clubs, retirement homes, high school clubs, etc.

- b. Next, think about each of these groups and their respective goals. Try to think of a potential link between each group's activities and the revitalization of the commercial district. What activities, expertise or resources do they have? What are their objectives and constituencies?



What clubs, agencies, and community organizations can we partner with?

10. Share the action plan with potential partners. (Executive Director & Board)

Identify areas partners have identified that are inline with the overall strategies and where they can assist with implementing the plan.

11. Follow-up (Executive Director & Board)

Once the action plan is developed, host a public meeting to share the results. You may choose to also solicit information to refine the plan, but not to change or alter it dramatically. Use this as an opportunity to get community support for downtown revitalization and to engage community members in helping to implement the plan. Periodically review the plan at board meetings to ensure you stay focused and that committees are moving forward with projects and activities that are achieving your priorities.

ADDENDUM

- Roles and Responsibilities
- Timeline
- Transformation Strategies
- Sample Transformation Strategy

ROLES AND RESPONSIBILITIES

We encourage a team approach to develop the strategic plan to encourage broad-based participation and to best use individual skills and interests. Please feel free to modify based on your local needs. Here's the different roles and responsibilities for the different folks who will be involved in the process:

EXECUTIVE DIRECTOR/MAIN STREET COORDINATOR

The executive director is responsible for keeping the process moving along in partnership with the Consultant Convener. This includes:

- Scheduling meetings.
- Updating the convener on progress.
- Gathering documents and market data for the team to review.
- Helping recruit people to be on different teams.
- Preparing drafts.
- Generally ensuring teams have the resources they need to do the tasks they have been asked to do.

CONSULTANT CONVENER

The consultant convener's role is to serve as a sounding board and to assist the executive director in keeping the process moving. The convener asks questions and provides feedback on each step of the process.

STRATEGIC PLANNING LEADS

The strategic planning leads work with the executive director to:

- Finalize elements of the strategic planning process that will be used.
- Recruit people for the teams.
- Help prepare and analyze surveys
- Help prepare drafts of the plan.
- Generally help move the process forward.

The leads will typically be board members but you might also consider former board members with a good grasp of downtown and your organization.

BOARD MEMBERS

Board members should be prepared to approve the process and participate based on their skills and interest. Someone really like to talk to people? That board member would be great for community engagement. Others like data? Help with gathering market data. Advisory Team

COMMUNITY ENGAGEMENT TEAM

If you have a separate community engagement team, this group develops survey mechanisms and then identifies ways to get input from a wide variety of stakeholders to ensure your process is inclusive.

COMMITTEES

Committee members should provide feedback early in the process on what they see are issues or opportunities based on their area of work. They also participate in updating work plans once the plan has been adopted by the board.

PARTNERS

The work of continuing to improve your downtown is broad. Working with partners on collaborations through shared goals and objectives uses your community's resources more effectively.

COMMUNITY MEMBERS

Community members have a big role to play in sharing their hopes and dreams for the future of downtown, and, through the process of creating a shared vision, a role to play in implementing that vision.

TIMELINE

This is a sample timeline. It can be adapted to meet your specific plans for your process. For example, some steps you might combine, others you might choose not to do. Note: some activities will overlap.

Tasks	Timeline	Who
1. Assemble the Team	1 week	Board
2. Assess the District	2 weeks	E.D.; Team Leads
3. Community Engagement (survey, focus groups)	4 weeks	E.D.; Engagement Team; Team Leads
4.a. Identify assets, issues, liabilities, opportunities	2 weeks	E.D.; Team Leads
4.b. Draft Vision Statement	1 weeks	E.D.; Team Leads
5. Team Work Session	1 week	E.D.; Team Leads; Advisory
6. Share Draft with Board	2 weeks	E.D.; Team Leads
7. Feedback from the Community	4 weeks	E.D.; Engagement Team; Team Leads
8. Share Plan with Committees	4 weeks	E.D.; Team Leads
9. Identify Partners	1 week	Board
10. Share with Potential Partners	On-going	E.D.
11. Follow-up	On-going	E.D.; Board; Team Leads

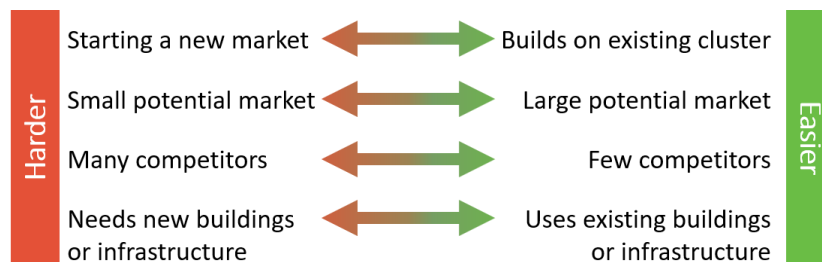
TRANSFORMATION STRATEGIES

Transformation Strategies are cross-cutting priorities across the four points of the Main Street Approach that are intended to help a main street organization focus your efforts. They are based on a community's vision for downtown and grounded in market realities. Just because you are selecting a new Transformation Strategy does not mean that your organization will completely abandon your previous efforts. Your downtown or district your organization likely has on-going projects and programming that will continue but this will give you an opportunity to cut down siloes that may exist and work more collaboratively among committees.

For most organizations, you should plan to choose one or two Transformation Strategies. The strategies you choose should be compatible with each other (so they can coexist in the same area at the same time). In some cases, they may be complementary (e.g., a daytime strategy paired with an evening strategy). In other cases, one strategy may be more of a short-term strategy with low-hanging fruit that can be easily accomplished versus a second strategy that may be more of a long-term strategy that the community can work to aspire to as it has aspects that are more challenging to implement. Choosing more than two strategies makes it harder to maintain a rigorous focus on a deliberate direction. If you select more than one Transformation Strategy, you should also take stock of whether you have the capacity (within your own organization and your partners) to advance the strategies effectively.

The strategies you select are not permanent. Think of them as three-to-five-year plans. After conducting research to gather information related to all the key inputs, screen the catalyst strategies and select a list of potential transformation strategies that follow key themes from the community feedback, help meet the needs of a key customer base or community demographic, and/or that are focused around one of your community's unique niches as determined by your downtown or district business mix and assets. If none of the catalyst strategies are a perfect fit for your community's unique needs you may choose to identify a customized strategy that is a combination of one or more catalyst strategies or that speaks to a particular need or challenge within your community.

Once you select a list of potential transformation strategies, your organization can assess the fit and feasibility of the strategies you are considering. Which strategies are a good fit? Here's a graphic that can help you decide:



A Catalyst Strategy is an off-the-shelf Transformation Strategy. It defines an economic focus or niche, describes the customers or types of businesses that are necessary to support it, and suggests initial projects for getting started. The Catalyst Strategies may at first sound somewhat generic—and they are. They're designed to be adaptable to a variety of places and circumstances and then can be refined and customized over time, as you gain deeper understanding of your local and regional market and as you assess your success in achieving your goals. The ready-made Catalyst Strategies fall into two broad types: those that are focused on a specific customer segment and those that are focused on an industry, product, or service segment. Some of the Catalyst Strategies available for you to adopt or customize include:

Customer Based: Downtown workers and/or residents; college students; tourists; military installations; family-friendly, family-serving; millennials; age in place

Product Based: arts; entertainment/nightlife; furniture/furnishings; professional services; health and wellness; sports and recreation; ethnic specialties; apparel; agriculture; education; green products; convenience; manufacturing; food

EXAMPLE

Here's an example of how to use the Four Points to develop activities to meet an overarching strategy.

STRATEGY: INCREASE THE NUMBER OF DOWNTOWN RESIDENTS.

SAMPLE ACTIVITIES:

DESIGN:

- Work with property owners to create upper-floor apartments and condominiums for district workers and others interested in living in the district.
- Create public gathering spaces.
- Change storefront displays at least monthly. The people who live and work near the district see its window displays almost every day. Keeping window displays fresh helps keep them engaged.
- Ensure the sidewalks are attractive, appealing, safe, and well-maintained.

ORGANIZATION:

- Include one or more of the district residents on the board of directors and in committees.
- Build partnerships with neighborhood associations.
- Organize mixers for residents to meet each other and interact with business owners.

PROMOTION:

- Offer a concierge type service for downtown residents.
- Offer customer loyalty program.
- Have a "welcome to downtown" gift packet for downtown residents.

ECONOMIC VITALITY:

- Add needed product lines to existing businesses that appeal to downtown residents.
- Connect property owners with incentives to help convert unused or underused space into upper-floor residential.

MEASURING PROGRESS

- Track of the number of new residential units developed and the amount of reinvestment.
- Track the number of residents downtown.
- Periodically survey residents to learn about attitudes and perceptions about the district, current shopping habits, additional products and services they would like to buy within the district, demographic characteristics of the residents participating in the survey.
- Ask businesses to keep an informal tally of the number of residents who shop there and how much they spend...are the numbers increasing?
- Choose random spots in the district and count the number of people who walk by during the 30 minutes before most businesses open, during the lunch hour, and during the 30 minutes after most businesses close. Do this at least twice a year. Are the numbers increasing?