



ORGANIZATION

Involves Creating a Strong Foundation For a Sustainable Revitalization Effort, Including Cultivating Partnerships, Community Involvement, and Resources for the District

Best Practices for NC Main Street Organizations

Best Practices for Creating a Sustainable Main Street Organization

- ◆ Annually review and understand along with your board/steering committee the Benefits & Requirements of your program, whether a new Downtown Association Community program or designated NC Main Street.
- ◆ Store important documents and a backup on computer files in a safe place (cloud based program, or USB in a fireproof safe)
- ◆ Stock your office with supplies that help assist business and property owners: awning samples, paint samples, digital camera, construction measuring tape, flashlight, boots or closed toes shoes, etc.
- ◆ **Create a digital file folder of all required materials to be submitted to NCMS.** Organize folders under each of the Four-Points:
 - ◆ **Organization** to house all non-profit documentation, personnel, management, budget and funding information, planning documents, communication initiatives, volunteer management, bylaws, articles of incorporation. If the program is a City program, policies and procedures for managing an advisory board along with your budget for the Main Street program. A quasi program would follow the non-profit guidelines.
 - ◆ **Economic Vitality** to house all business and business development information: incentives, market analysis data, statistical information, National Register information, a database of local and regional developers, codes and ordinances and a **complete property inventory** spreadsheet.
 - ◆ **Design** to house information about streetscape plans and improvements, signage, displays, public art, public spaces, the National Park Services' Preservation Briefs and the Secretary of the Interior's Standard for Rehabilitation, a database of resources for construction and design, and building improvements.
 - ◆ **Promotion** to house information about image campaigns and branding, retail promotion, a database of promotion and event vendors, craftsmen and artists, marketing, and special events.
- ◆ **Set up organizational best practices** for your organization's model. Those best practices will be shared during the Organization Basic Training. NC Main Street has a Check List template on the website or request one from NCMS Staff.
- ◆ **Set up a continuity plan.** NCMS has a template for setting up a plan [Organization | NC Main Street \(ncmainstreetandplanning.com\)](http://ncmainstreetandplanning.com) under Operations.
- ◆ If the organization is a non-profit or quasi model the following documents will be needed:
 - ◆ **Insurance Needs:**
 - ◆ General Liability
 - ◆ Umbrella Liability
 - ◆ Directors & Officers
 - ◆ Volunteers Accident Coverage
 - ◆ Special Event Liability
 - ◆ Automobile Liability for travel for work
 - ◆ Liquor Liability (as applicable)
 - ◆ Property or Renters Insurance if renting an office

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◆ **Additional Best Practices for Non-Profit & Quasi Organizational Models**

- ◆ NC Unemployment Tax Number & Employer's Quarterly Tax & Wage Report
- ◆ NC Charitable Solicitation License (if applicable)
- ◆ Non-Profit Tax Returns (990's)—**file and keep up with these**
- ◆ D-U-N-S Number for the organization if applicable. Many grants require this number.
- ◆ Conflict of Interest Policy for Board Members
- ◆ Personnel Policy for Staff & Staff Evaluation guidelines
- ◆ Fiscal Policy
- ◆ Employees:
 - ◆ Write a job description for each staff member
 - ◆ Develop a work plan for each staff member
 - ◆ Develop staff evaluation forms and **evaluate annually**
 - ◆ Develop a system for filling position vacancies
- ◆ **Financials Budget/Funding:** create an annual budget. **This is applicable to City programs as well.** NCMS can provide a budget excel spreadsheet and the following should be considered when preparing the downtown organization budget. These are required when the DAC program moves up to designated NC Main Street status:
 - ◆ A budget dedicated to revitalizing the commercial district
 - ◆ Contain funds adequate to cover the salary and benefits of staff, office expenses, travel, professional development, and committee activities
 - ◆ Revenue sources are **varied and broad-based**, including appropriate **support from municipal government**
 - ◆ A strategy in place to help maintain stable funding
 - ◆ Align budget to accomplish the plan of work that is created (applicable to all organizational structures)
 - ◆ Process in place for financial oversight and management of the organization
 - ◆ **Regular monthly financial reports** are made **by the treasurer** to the organization's board, as applicable for DAC program (this may not be applicable to a city run program)
- ◆ **Maintain Financial Records.** This is necessary for **nonprofit organizations**. Municipal programs will fall under the municipal finance process.
 - ◆ Establish a bookkeeping system
 - ◆ Establish policy and system for paying payroll and invoices. Recommendation: minimum two signatures on each check. You may approve three or four who can sign and any combination is acceptable. We recommend at least three signatures.
 - ◆ Manage ALL donations and contributions in accordance with nonprofit best practices and in accordance with the terms of the contributions (reporting, tax exemption receipts, etc.)
 - ◆ Conduct established audits or financial reviews by an outside source (CPA) as advised by a CPA (usually a review every year, full audit every three years)
 - ◆ Establish division of financial duties as recommend by auditors
 - ◆ File 990 and all tax reports annually

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- ◆ **Board & Committees: Whether the organization is a nonprofit or an advisory board, board and committees should have procedures in place to manage volunteers.**
 - ◆ Board, Officer & Committee Member Job Description
 - ◆ System in place to track board, officer, and committee member terms of service
 - ◆ Board & Committee Recruitment Process & Application
 - ◆ Board Responsibilities Agreement
 - ◆ Board & Committee training system & materials
- ◆ **Maintain membership in Main Street America/National Main Street.** This is a requirement, but this membership includes access to their website with a wealth of resources.
- ◆ **Websites to Bookmark:**
 - ◆ *Main Street America:* <http://www.mainstreet.org/getinvolved/membership>
 - ◆ *NC Main Street & Rural Planning Center:* [NC Commerce: NC Main Street & Rural Planning Center](#)
 - ◆ *NC Main Street & Rural Planning for training materials and conference information:* [NC Main Street & Rural Planning \(ncmainstreetandplanning.com\)](#)