# NC MAIN STREET DIRECTORS GUIDE







### Welcome

#### Where to Start

Welcome to NC Main Street! You will soon discover that managing the Main Street Program locally is rewarding. The program takes a team of community partners and volunteers. One of your first tasks will be to get to know your local board, downtown business owners, property owners, and volunteers. If you are new to "Main Street," I would encourage you to review Main Street America's website.

You can understand how "The Approach" translates to Main Street.

mainstreet.org/mainstreetamerica/theapproach

### How The NC Main Street & Rural Planning Center Assists

The NC Main Street & Rural Planning Center (the Center) manages the NC Main Street, Small Town Main Street, and Downtown Associate Community programs, the Rural Transformation Grant Fund – Downtown Revitalization category, and the NC Main to Main Trail Initiative. Through its Main Street Program, staff provides designated communities with strategic economic development planning and technical assistance for downtown revitalization, extensive training and education for staff and volunteers, and grants for downtown revitalization. The Main to Main Trail is a tourism-based destination development initiative that is supported in part by a grant from the U.S. Economic Development Administration (EDA).

NC Main Street & Planning
NC Main to Main Trail

#### NC Main Street Focus Areas:

#### Strategic Economic Development Planning & Technical Assistance

The NC Main Street Program team works with individual Main Street programs and their community leaders to develop an asset-based, market driven 5-year strategic economic development plan for downtown, and a 1-2 year implementation/action plan to bring their five year plan to fruition. The team also works with communities on resources and funding that will strengthen the local Main Street program, and leverage redevelopment initiatives and small business growth. In partnership with the University of North Carolina at Greensboro, Department of Interior Architecture, NC Main Street provides façade improvement plans to property and business owners located in the downtown districts of designated NC Main Street and Small Town Main Street communities.

Request Assistance

### Training & Education

The NC Main Street & Rural Planning Center offers robust downtown revitalization training and education opportunities. The Center holds Regional Meetings with downtown professionals in June and November, and a Main Street Directors' Meeting in August. Main Street Basic Training courses are held in January, April, August, and October, and provided Main Street and Small Town Main Street program staff, board members, and volunteers with in-depth knowledge of the components of each of the four areas of Main Street's comprehensive program: *Economic Vitality, Design, Promotion, and Organization*. The Center provides site-specific training for designated Main Street, Small Town Main Street and Downtown Associate Community programs that requested training for board and committee members on downtown revitalization topics. Sign Up for Training

### Main Street Overview

#### What is Main Street America?

Working with a nationwide network of Coordinating Programs and local leaders, Main Street America has helped over 2,000 communities across the country bring economic vitality back downtown, while celebrating their historic character, and bringing communities together.

Learn about the movement



### The Four-Point Approach™

The Main Street Approach™ offers community-based revitalization initiatives with a practical, adaptable framework for downtown transformation that is easily tailored to local conditions. The Main Street Approach helps communities get started with revitalization and grows with them over time. Learn More

#### Economic Vitality | Develops Business

- Focuses on capital, incentives, and other economic and financial tools to assist new and existing businesses, catalyze property development, and create a supportive environment for entrepreneurs and innovators that drive local economies.
- MSA: <u>Learn more</u>NCMS: <u>Learn more</u>

#### Design | Develops Space

- Supports a community's transformation by enhancing the physical and visual assets that set the commercial district apart.
- MSA: <u>Learn more</u>NCMS: <u>Learn more</u>

#### Promotion | Develops Customers

- Positions the downtown or commercial district as the center of the community and hub of economic activity, while creating a positive image that showcases a community's unique characteristics.
- MSA: <u>Learn more</u>NCMS: Learn more

#### Organization | Develops Partnerships

- Involves creating a strong foundation for a sustainable revitalization effort, including cultivating partnerships, community involvement, and resources for the district.
- MSA: <u>Learn more</u>
- NCMS: Learn more

# Eight Guiding Principles

The National Main Street Center's experience in helping reinvigorate commercial corridors across the country has shown time and time again that the Main Street Approach is a proven framework for assisting communities to succeed in their revitalization efforts. Building on the Main Street Approach, the following values can help staff and volunteers articulate a Main Street program's mission.

### Comprehensive:

No single focus, lavish public improvements, name-brand business recruitment, or endless promotional events – can revitalize Main Street. A comprehensive approach, including activity in each of Main Street's Four Points, is essential for successful, sustainable, long-term revitalization and sustainability.

#### Incremental:

Baby steps come before walking. Successful revitalization programs begin with simple activities that demonstrate "new things are happening" in the commercial district. As public confidence in the Main Street district grows and participants' understanding of the revitalization process becomes more sophisticated, Main Street can tackle increasingly complex problems and more ambitious projects. This incremental change leads to a much longer-lasting and dramatic positive change in the Main Street area.

### Self-help:

No one else will save your Main Street. Communities must have the will and desire to mobilize local resources and talent. That means convincing residents and business owners of the rewards they'll reap by investing time and money in Main Street – the heart of their community. A focused movement can produce long-term success by fostering and demonstrating community involvement and commitment to the revitalization effort.

### Partnerships:

Both the public and private sectors have a vital interest in the district and must work together to achieve common goals of Main Street's revitalization. Each sector has a role to play, and each must understand the other's strengths and limitations in order to forge an effective partnership.



# Eight Guiding Principles

#### Builds on Assets:

Community assets refer to the resources, strengths, and opportunities that exist within a community that can be utilized to improve its quality of life. These assets can be both tangible and intangible,. By recognizing and leveraging these assets, communities can foster collaboration, drive positive change, and enhance overall well-being.

### Quality:

Emphasize quality in every aspect of the revitalization program. A quality-focused approach applies to all elements of the process—from storefront designs to promotional campaigns to educational programs. Concentrate on quality projects over quantity.

### Change:

When skeptics turn into believers, attitudes on Main Street will turn around. Changes in attitude and practice are slow but definite – public support for change will build as the Main Street program grows and consistently meets its goals. Change also means engaging in better business practices, altering ways of thinking, and improving the physical appearance of the commercial district. A carefully planned Main Street program will help shift public perceptions and practices to support and sustain the revitalization process.

### Implementation:

To succeed, Main Street must show visible results that can only come from completing projects. Frequent, visible changes remind us that the revitalization effort is under way and succeeding. Small projects at the beginning of the program pave the way for larger ones as the revitalization effort matures, and that constant revitalization activity creates confidence in the Main Street program and ever-greater levels of participation.



# Six Community Standards

The six Community Evaluation Standards aim to elevate local revitalization efforts and provide the Main Street America Network with a strong foundational framework for reviewing progress, recognizing strengths and accomplishments, understanding trends and challenges involved with local revitalization, and implementing strategies that keep moving Main Street programs forward.

### 1 | Broad-based Community Commitment to Revitalization

Standard One reflects that successful and sustainable revitalization efforts are not just the work of a single organization but should result from a community-wide effort that brings the public and private sectors together with a strong sense of ownership in their downtown or commercial district. This Standard reviews the Main Street organizations' essential role in fostering a culture of inclusion, engagement, collaboration, and commitment from all community sectors. Launching a program, growing it incrementally from one year to the next, and sustaining success for the long run is only possible through a diversity of solid partnerships and collaborations, continued outreach, and communication. Learn MORE

### 2 | Inclusive Leadership and Organizational Capacity

Strong, thriving communities don't just happen. They need influential leaders at all levels, from a broad base of committed volunteers to dedicated professional staff offering their time, talents, and passion for this work. Standard Two reflects the value we place on PEOPLE as Main Street's greatest resource and our belief that everyone in the community has a place in Main Street. This Standard encourages Main Street programs to prioritize human capital and develop a clear operational structure and practices that increase the organization's capacity to engage all community sectors and leverage their participation in their revitalization efforts. Learn MORE

### 3 | Diversified Funding and Sustainable Program Operations

A successful revitalization program must have the financial resources to carry out its work and sustain its operations. Program sustainability relies on the diversity of revenue streams, as dependency on one primary or only source could jeopardize the program's operations. Through this Standard, Main Street programs demonstrate a priority for ensuring that the community invests in the Main Street organization and programming through a comprehensive and balanced funding structure that ensures successful and sustainable revitalization efforts. Learn MORE



# Six Community Standards

### 4 | Strategy-Driven Programming

Main Street has a strong track record for making change happen in communities nationwide. Change is an essential guiding principle for Main Street. However, rather than letting change happen, Main Street programs define and manage it from one year to the next through a strategy-driven work plan and aligned implementation process. Standard Four brings together all integrated components that must be in place to plan and successfully implement the revitalization work. Centered around Main Street's Four Point Approach, these integrated components are driven by a local Transformation Strategy(s) aligned through community participation and based on an understanding of the district's unique and competitive market position.

Learn More

### 5 | Preservation-Based Economic Development

Successful Main Street efforts are built on the principle that district economic development is obtained by leveraging and preserving its unique historic and cultural assets. Standard Five confirms our firm belief that a community's place-based and diverse cultural assets reflect its identity's richness and strength and establish a competitive market advantage. <u>Learn MORE</u>

### 6 | Demonstrated Impact and Results

Main Street communities are part of a national network with a proven record for generating strong economic returns and strengthening the district's position within a highly competitive marketplace. Standard Six highlights the importance of tracking, packaging, and demonstrating the qualitative and quantitative impact of the program's revitalization efforts. It also allows the local Main Street program to tell their stories and advocate for resources needed for sustainability. Learn MORE



# Annual Main Street Assessment

Decades of experience implementing the Main Street Approach in communities across the country have demonstrated that building and sustaining a thriving downtown or neighborhood commercial district is not a one-time project but an ongoing process that requires long-term commitment, continued focus, and strategic action. The Main Street America Community Evaluation Framework empowers communities to review their progress, recognize achievements, acknowledge challenges, and identify opportunities to move their efforts forward continually.

#### **Evaluation Framework**

The key elements of the Community Evaluation Framework include six Standards and a process consisting of: Annual Community Self-Assessment: This component allows communities to review and reflect on the organization's progress, impact, and needs toward the district's revitalization vision. Local leaders are encouraged to incorporate this tool into their planning process.

- Standardized Reporting Practices: This component is intended to help communities track and measure the level of investment the district is experiencing and highlight the level of engagement and investment the community is making in the Main Street program. Beyond just meeting reporting requirements, the information can be a powerful tool to promote the value and impact of the organization's efforts.
- Onsite Community Progress Visits (at least once every two years): The accreditation process cannot be
  complete without the opportunity to connect with the communities, if possible annually or at least every
  other year (biennially). A progress visit should include meetings with local leaders and stakeholders to build
  consensus on the program's strengths and needs and a visual assessment of the district's conditions and
  opportunities.
- These components provide important tools to celebrate wins, promote Main Street's value and impact, and help us understand local revitalization needs and the necessary resources for successful revitalization.

### Standards

·Standard 1 Broad-based Community Commitment to Revitalization

Standard 2 Inclusive Leadership and Organizational Capacity

·Standard 3 Diversified Funding and Sustainable Program Operations

·Standard 4 Strategy-Driven Programming

·Standard 5 Preservation-Based Economic Development

Standard 6 Demonstrated Impact and Results

·Learn More About The Standards



NORTH CAROLINA MAIN STREET



# Annual Main Street Assessment

### Assessments and Designations

The Main Street America Community Evaluation Framework determines Main Street America Community designation status—a mark of national distinction representing a Main Street program's commitment to advancing shared prosperity, creating a resilient economy, and improving quality of life through place-based economic development and community preservation. Designated programs meet rigorous standards and demonstrate impact across multiple key indicators to earn this status.

Main Street America designation is a powerful advocacy tool, signaling to local stakeholders, as well as city, state, and national funders, that a Main Street program has an established position within a nationwide movement that has a 45-year proven track record of generating impressive economic returns, building local capacity, creating welcoming and inviting communities, and creating lasting impact.

Beyond determining Main Street America's designation status, the framework is a tool Main Street leaders can use to evaluate how their program's efforts align with the new Standards and identify areas for deeper focus and prioritization. It also serves as a basis for local leaders to work with their Coordinating Program on identifying areas for capacity building, program development, and training needs.

<u>Learn More About The Designation Tiers</u>

### Reporting Platform

The Main Street America Accreditation Platform provides a one-stop portal for local Main Street programs to complete self-assessments for designation.

Learn More About the Accreditation Platform



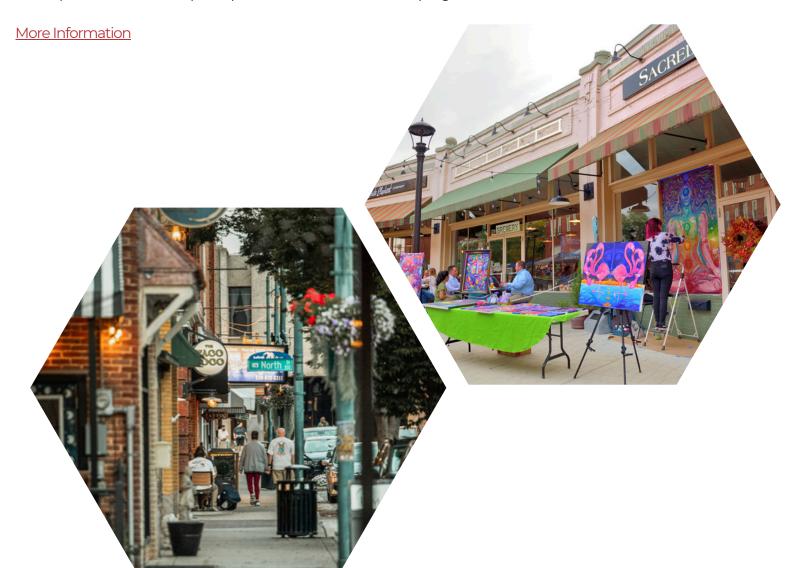
# Annual Agreement

### Annual Agreement Instructions:

Designated Main Street & Small Town Main Street communities must sign the Annual Agreement through DocuSign. The fully executed document must be received by its deadline to remain active in the program. Once you receive the email from DocuSign, please do not delay signing the agreement and verify that your city/town manager has signed it so you can receive your copy of the fully executed document by its deadline.

#### Process:

- The Program Director will receive an email with the agreement through DocuSign. The director will sign the agreement, which will automatically be emailed to the City/Town Manager. DIRECTORS—You must contact the City/Town Manager and let them know you have sent the document for their signature. The document may not be received by the deadline if they do not sign.
- City/Town Manager will sign the agreement. The agreement is now fully executed.
- A copy of the fully executed document will automatically go back to the Program Director, City/Town Manager, and NC Main Street.
- A signed document confirms that the local Main Street program thoroughly understands the benefits and requirements of active participation in the NC Main Street program.



### **Annual Statistics**

### Main Street = Economic Development

Through the cumulative success of the Main Street Approach™ and Main Street America programs on the local level, the Main Street Movement has earned a reputation as one of the most powerful economic development tools in the nation. Main Street America documents this impact annually through the collection of statistical information on the preservation and economic activities performed by local Main Street programs throughout the country.

### North Carolina Impact

In July NC Main Street communities submit statistics. During the year, Main Street Directors track the economic activity in their historic core so that they have a strong understanding of the economic impact in the downtown. Statistics are tracked from July 1 to June 30th of each year.

### Data to Track

- Public and private investment dollars
- Net gain number of new businesses and business expansions
- Net gain number of full-time and part-time jobs
- Number of building rehabilitations and façade improvements
- Number of public improvement projects
- Number of new construction projects
- Number of housing units in downtown
- Number of commercial spaces in downtown
- Total square footage of downtown property
- Annual average rent per square foot in downtown
- Number of volunteer hours and the dollar value of that time

#### More Information



# Annual Licensing Agreement

### National Main Street Licensing Agreement

The Annual Licensing Agreement is between you, the local NC programs (Main Street & Small Town Main Street), and the National Main Street Center. \*Downtown Associate Community programs are not required to sign the licensing agreement.

#### Process:

- Main Street & Small Town Main Street program directors/coordinators will receive an email from Main Street America via echosign@echosign.com with the Annual National Main Street Licensing Agreement.
- Agreement will be signed by the Main Street and Small Town Main Street program directors/coordinators. It will then automatically go to the NC Main Street & Rural Planning Center Director for signing.
- NC Main Street & Rural Planning Center Director will sign the agreement. The fully executed agreement will automatically return to the NC Main Street & Rural Planning Center Director, the program director/coordinator, and the National Main Street Center.
- If you DO NOT get an agreement, contact NC Main Street Center staff.

#### More Information



# Design Services

### **Design Services**

Since March 2016, the North Carolina Main Street Program has partnered with <u>UNCG's Interior Architecture</u> <u>Department</u> and its <u>Center for Community-Engaged Design</u> to assist designated Main Street and Small Town Main Street communities across the state. Undergraduate and graduate students are selected to become <u>Main Street Fellows</u>. The Main Street Fellows work with UNCG Interior Architecture Department Professors to complete facade rehabilitation designs and upper-story apartment conversions in designated Main Street communities.

#### Requirements:

- A benefit to designated NC Main Street & Small Town Main Street communities
- Downtown Associate Communities cannot use this service
- Speculative projects are not accepted
- Property owner(s) must be motivated to implement the design

#### Request Assistance



# Impact Report Template

### Showcasing Your Impact

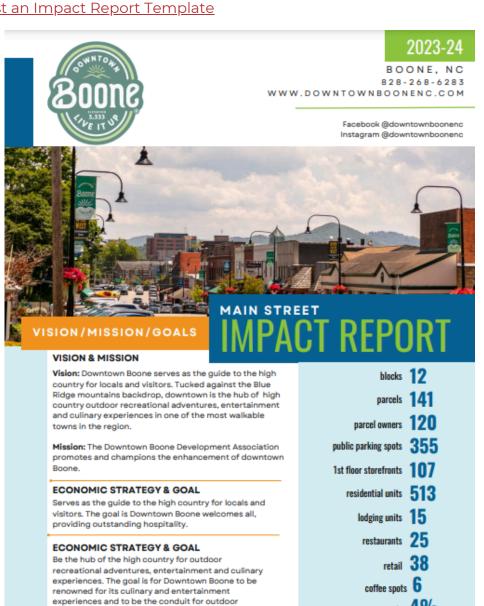
The NC Main Street & Rural Planning Center provides all NC Main Street communities a Canva template in order to report the program's impact for the year. With this template, you can update and customize the content, spreading the great news!



vacancy rate 4%

#### Request an Impact Report Template

recreational adventures.



# Website Template

### Website Template

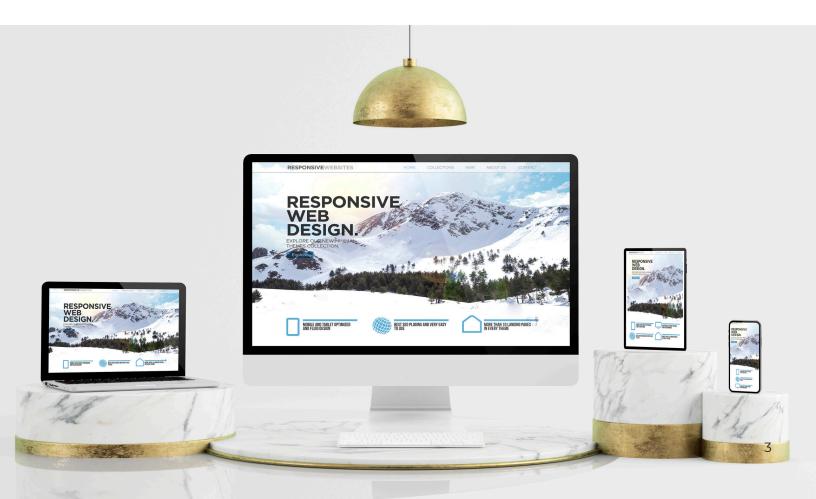
Since 2023 the NC Main Street & Rural Planning Center has provided a website template and website checklist to assist communities in building a strong website that provides information to the following target groups

- Investors
- Businesses
- Tourists
- Local Residents

#### Requirements:

• A benefit to designated NC Main Street & Small Town Main Street communities

<u>View Website Template</u>
<u>Request the Website Template</u>
<u>Download the Downtown Website Guide</u>



# Downtown Business Support

#### **US Small Business Administration**

Created in 1953, the U.S. Small Business Administration (SBA) continues to help small business owners and entrepreneurs pursue the American dream. SBA is the only cabinet-level federal agency fully dedicated to small business and provides counseling, capital, and contracting expertise as the nation's only go-to resource and voice for small businesses.

• Business Guide | Funding | Learning | Loan Assistance | www.sba.gov

### Small Business and Technology Development Center | SBTDC

Founded in 1984, the North Carolina SBTDC is a business advisory resource for growing and developing small to mid-sized businesses. Our highly skilled professionals provide services statewide from offices hosted by campuses of The University of North Carolina System. The SBTDC operates in formal partnership with the U.S. Small Business Administration, making it a unique and valued asset in the economic development infrastructure of North Carolina.

• Business Life Cycle | Services | Locations | Resources | osbtdc.org

#### NC Small Business Center Network

The NC Community Colleges Small Business Center Network (SBCN) is the state's largest state-supported small business assistance initiative. Started in 1984 with funding by the North Carolina General Assembly the Network has 60 sites throughout the state with Centers conveniently located within a 30-minute drive of every North Carolinian. The Small Business Center Network focuses on entrepreneurship, small business and economic development with an emphasis on assisting start-ups, early stage, and businesses seeking disaster assistance or seeking to stabilize

• General | Services | Training | Counseling | Resources | Locations | ncsbc.net



# Downtown Business Support

### Economic Development Partnership NC

The EDPNC improves the economic well-being and quality of life for all North Carolinians by recruiting new businesses to the state, supporting existing employers, assisting companies with international trade, counseling small business and startups, and promoting North Carolina as a tourism destination.

• General | Incentives | Business Assistance | Export Assistance | News and Resources | edpnc.com

#### **SCORE**

Since 1964, SCORE has helped more than 17 million entrepreneurs start, grow or successfully exit a business. SCORE's 10,000 volunteers provide free, expert mentoring, resources and education in all 50 U.S. states and territories.

• Find a Mentor | Workshops and Events | Templates and Resources | score.org

### Carolina Small Business Development Fund

Carolina Small Business Development Fund (CSBDF) is a 501(c)3 nonprofit guided by the belief that when small businesses succeed, everyone benefits. CSBDF provides technical assistance to financial institutions and entrepreneurs and administer grants to help address the needs of unserved and underserved people and communities.

Programs | Loans | Learn Online | News | carolinasmallbusiness.org

#### Retail Merchants Association

NC Retail Merchants Association is a nonprofit organized to improve the business climate for retain merchants in North Carolina

Resources | <a href="https://ncrma.org/">https://ncrma.org/</a>



## Main Street Director Information

#### Main Street Listserv

To Send Emails Use: msforum@ml.nc.gov

The purpose of the listserv tool is to:

- Offer Main Street programs an easy way to ask questions, share ideas and to network with peer communities.
- Offer Main Street & Rural Planning Center staff a way to easily communicate with your community about opportunities that may be of interest, including but not limited to grants, training, etc.
- This is a "closed" listserv which means that names can only be added by the NC Main Street Center staff. Only the primary contacts that our Main Street staff have for Main Street communities are on this listserv. Additional staff may be added at the request of the local Main Street Director to Naomi Riley.
- You may forward the information from the listserv; however, if you forward it and the recipient of the email hits "unsubscribe" at the bottom of the email, then you will be unsubscribed, not them. Delete the box at the bottom of the email containing the unsubscribe, archives, new message information, etc. before you forward the email.
- You may "unsubscribe" at any time, but you may likely miss important information that our staff may send out through the forum. Each email that is sent will show a box like the one below at the bottom of the email.
- As of the date of publication, we have not received information on how to access the archives on the listserv. We will update the guide and send you that information when available.

### Community Surveys

In the event we need information from our communities, we utilize a dedicated page on our website to gather the information. The page is HERE



# Main Street Director Trainings

### Training Requirements:

Training is essential. As the new Program Director, you have training requirements that must be met within the first year of your employment. Not attending a required training within the first year WILL affect your community's accreditation. The training will assist you in performing your job duties at the highest caliber.

Please RSVP to all required trainings NOW. We encourage you to share these training dates with your town manager and board chair so that they know you have a required training on certain dates. It will assist them in future scheduling where you need to be present.

Register for ALL Trainings HERE

#### Orientation | New Director Requirement | Held EACH Month | Virtual

• Must attend within 2 months of hire date

# Four Basic Trainings | New Director Requirement | Held ONCE a Year p/Training | Virtual

- Must attend each of the 4 Basic Trainings within 1st year of employment
  - 1) Economic Vitality 2) Design 3) Promotion 4) Organization

# Directors Meeting | New Director Requirement & Annually for ALL Directors Held ONCE a Year | In Person

- Must attend during the 1st year of employment and annually thereafter
- In the case of a vacancy or illness/emergency, a substitution for the Director may be made for the meeting
- A dedicated page for the Director's Meeting is located HERE

# Reginal Meetings | New Director Requirement & Annually for ALL Directors Held TWICEs a Year | 1 in Person 1 Virtually

- Must attend at least one during the 1st year of employment and at least one annually thereafter
- It is recommended to attend both meetings

#### Recommended Reading

The first year will be very busy for you. We have a menu of recommended readings that will help you as you grow in the profession. These are not required readings, but offered to those who want to advance their skills in downtown economic development. Learn MORE

# Main Street Director Trainings

#### NC Main Street Conference: | Held ONCE a Year | In Person

- Must attend during your 1st year of employment and annually thereafter
- The Main Street Director and a minimum of one volunteer must attend the annual NC Main Street Conference
- It is recommended for community leadership, board members, and committee members attend the conference.
- NCMS provides each designated community with two complimentary registrations
- There is a separate registration process for conference registration. You will receive emails on signing up before the conference each March
- Information: ncmainstreetandplanning.com/nc-main-street-conference



# Important Websites

#### **NC Commerce**

General | For Business | Grants & Incentives | Data, Tools, & Reports | commerce.nc.gov

#### NC Main Street & Rural Planning Center | OFFICIAL STATE PAGE

- General
- <u>commerce.nc.gov/about-us/divisions-programs/rural-economic-development-division/nc-main-street-rural-planning-center</u>

#### NC Main Street Center | DESIGNATED COMMUNITY INFORMATION

- Deadlines | Annual Agreement | Annual Assessment | Licensing Agreement | Statistics
- Design | Technical Assistance
- Funding | Partner Resources
- Awards | Champions
- <u>commerce.nc.gov/about-us/divisions-programs/rural-economic-development-division/nc-main-street-rural-planning-center/main-street-program/designated-communities</u>

#### NC Main Street & Rural Planning | TRAINING: INFORMATION

- General | Disaster Recovery | Main Street Training | Main Street Conference
- <u>ncmainstreetandplanning.com</u>

#### National Main Street Center

https://www.maintomaintrail.com

- General | Pressroom | Podcast | Resources | The Latest (Blog and News)
- mainstreet.org

#### NC State Historic Preservation Office

• General | Survey and National Register | Restoration Services | Environmental Review

Local Preservation | Grants
 hpo.nc.gov/about-nchpo
 hpo.nc.gov/about-nchpo
 NC Main to Main Trail
 Eight Regions
 Highlighting NC Main Street Communities

Managing a local Main Street program requires directors to manage many various items. Below is a suggested file folder structure to help you organize information that is directly tied to information that you will be required to report to the state.

During your orientation period we will send you the files so that you can begin reading materials that will help you understand Main Street's best practices. We highly recommend that you share these resources with your board and volunteers so that they, too, will have a deeper understanding of the "Main Street" framework.

#### Folder Name: Main Street America:

- Subfolders
  - Membership:
    - Locate the MSA Membership Card and move to this folder.
  - Agreement:
    - Locate the MSA licensing agreement and move to this folder.
  - Economic Vitality (EV):
    - From the post orientation email, upload ALL files that begin with EV\_. Please read the information and forward it to your board members and committee members.
    - As you find EV educational documents in the MSA resource library, file them in this folder for future reference.
  - Design:
    - From the post orientation email, upload ALL files that begin with DESIGN\_. Please read the information and forward it to your board members and committee members.
    - As you find Design educational documents in the MSA resource library, file them in this folder for future reference.
  - Organization:
    - From the post orientation email, upload ALL files that begin with ORG\_. Please read the information and forward it to your board members and committee members.
    - As you find Organization educational documents in the MSA resource library, file them in this folder for future reference.
  - Promotion:
    - From the post orientation email, upload ALL files that begin with PROM\_.
    - Please read the information and forward it to your board members and committee members.
    - As you find Promotion educational documents in the MSA resource library, file them in this folder for future reference.

#### Folder Name: NC Main Street

Subfolders

#### General Information:

- Save this New Directors Guide
- Save Orientation PowerPoint

#### Calendar:

NCMS\_2025\_NCMainStreet\_Calendar

#### Annual Agreement:

Locate the signed agreements on your computer and move them to this folder. If you need help locating the agreement, please let us know. We are here to help!

#### Assessment:

 Locate previous assessments and move them to this folder. Make sure each year's assessment is saved with the date of the assessment for easy sorting

#### Statistics:

• Locate the previous year's statistics and move them to this folder.

#### Building Inventory:

Locate your building and business inventory and file it in this folder.



### Folder Name: Plan of Work:

- Subfolder
  - Full Plan: Locate your current plan of work and upload it here, Upload NCMS\_PlanOfWork\_Template
  - Design Actions: Upload any supporting documents about this committee's work plan items into this folder
  - EV Actions: Same as above
  - Promotions Actions: Same as above
  - Organization Actions: Same as above



"A successful community is one that empowers its citizens through strategic planning, ensuring that every perspective is valued in the decision-making process."





Nonprofits need to maintain various files and records to ensure compliance with legal requirements and support their operations. Establishing a systematic approach to securely maintaining these records and ensuring they are readily accessible when needed is essential. Keeping organized and comprehensive records helps in transparency and accountability, which are crucial for the trust of donors, members, and the community. Save files so that they can be easily searched.

RESOURCES: Non Profit Compliance: ncnonprofits.org/working-nonprofits

SAMPLES: Most items below can be located on our website: <a href="https://www.ncmainstreetandplanning.com/organization">https://www.ncmainstreetandplanning.com/organization</a>

#### Folder Name: Non Profit

Sub Non Profit Folder Name:

#### Organization

Sub Organization Folder Name:

#### NC Non Profit Legal Checklist:

• Download a copy of the checklist. Make sure each year there is an annual audit of non profit compliance. File the checklist in this folder. Located on website.

#### Articles of Incorporation

• Locate and file it in this folder. Refer to the checklist above if you cannot locate it.

### Bylaws

• Locate and file in this folder. If you do not have any, refer to the samples on our website. It is vital for your Board of Directors to adopt Policy and Procedure Manual as soon as possible.

#### IRS Determination:

• Locate your tax exempt letter and move it to this folder. If you don't have it, contact the IRS and they will send it to you.

#### Charitable Solicitation

 Include all the documents you will need to upload to make certain you are in good standing with the NC Secretary of State's office. Learn more <u>HERE</u>

### Policy and Procedures

• Locate and file in this folder. If you do not have any, refer to the samples on our website. It is vital for your Board of Directors to adopt Policy and Procedure Manual as soon as possible.

#### Folder Name: Non Profit

- Sub Non Profit Folder Name:
  - Board Meetings
    - Sub Board Meetings Folder Name:
      - Year\_Board Meeting (2024\_Board Meetings)
        - Year Sub File Name:
          - Month\_Board Meeting (01\_Board Meeting)
            - Each Month Include: Agenda, Attendance, Minutes, Balance Sheet (cash basis), Profit and Loss Statement (cash basis), Budget vs. Actual Statement (cash basis), Resolutions, Policy Decisions

#### Folder Name: Non Profit

- Sub Non Profit Folder
  - Financials
  - Year\_Financials (2024\_Financials)
    - Sub Year Financial Folder:
      - Month\_Records (01\_Records, 02\_Records)
      - Bank Statement
      - Invoices
      - Receipts
  - Annual Budget
  - Annual Tax Return



# NC Main Street Staff Contacts



Elizabeth (Liz) Parham, CMSM Director	lparham@commerce.nc.gov
Sherry Adams, CMSM Program Manager	sadams@commerce.nc.gov
Naomi Riley Downtown Services Coordinator	naomi.riley@commerce.nc.gov
Mike Dougherty Downtown Development Specialist	mike.dougherty@commerce.nc.gov
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