



STRATEGIC PLAN FOR 2013-2018



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INTRODUCTION

Historic Downtown Somerville is a regional commercial district catering to shoppers in Somerville and Somerset County. The downtown special improvement district management organization has been working for more than a twenty five years to enhance the district by presenting a wide variety of special events in the downtown for both regional visitors and community residents.

Since 2008, the Downtown Somerville Alliance (DSA) has been using an organizing method known nationally as the Main Street Four Point Approach™. The downtown commercial district is the historic and current heart of Somerville, and defines the local identity and reflects the community's history and 'sense of place.' The Main Street Approach™ stresses historic preservation as the underlying design principle for the revitalization effort. Main Street efforts nationwide aim to maximize the economic potential of each historic commercial district while preserving its authentic character. For Somerville, the volunteer-led committees or teams are important to the success of the program and involve stakeholders—be they residents, business owners or property owners—in making decisions about the future of the downtown. These stakeholders participated in all facets of the research leading up to the creation of this new Strategic Plan that represents the next phase in the DSA's organizational development.

Consulting Services from Main Street New Jersey

As part of Somerville's participation in Main Street New Jersey, the state coordinating program provided staff assistance and consulting services to the Downtown Somerville Alliance as part of the State's effort to enhance the growth, effectiveness and sustainability of participating MSNJ organizations.

Heritage Consulting Inc., a Philadelphia- based consulting firm with a consulting contract with Main Street New Jersey to provide Organizational Sustainability services to participating MSNJ communities, led the three-phase Strategic Planning effort. Donna Ann Harris of Heritage Consulting Inc. worked collectively with Beth Anne Macdonald, DSA Executive Director, as well as DSA Board members, business owners and Borough Council Members to develop this Strategic Plan. The research was conducted over six months and included three distinct activities, which are outlined below.

1. SWOT Analysis. Held on January 31, 2013, this two-hour evening meeting received the input from eighteen participants, including Downtown Somerville Alliance Board members, downtown merchants, property owners, Borough Council members, and Planning Board members. During the meeting, we discussed the current conditions of both the downtown shopping district and the DSA organization. A summary memo was prepared that offered observations and recommendations for solving several specific problems in the short and medium term.
2. Online Consumer and Stakeholder Survey conducted for three weeks from March 23 to April 5, 2013 this survey was an extraordinary success with more than 770 responses. The survey provided critical demographic and market data about the current downtown district's current shoppers. A 75-page report resulted.
3. A Visioning and Strategic Planning Workshop held on Tuesday evening June 25, 2013. This session was three hours long and included twelve DSA Board members, business owners, property owners, a Borough Council member and Planning Board member. Prior to the workshop, all participants received copies of the Online Survey Report. This workshop began with a brief summary of the results of the Online Survey. During the workshop, all participated in a visioning exercise to help the assembled group visualize the future of downtown five years from now. Finally, we used the visioning exercise to identify specific strategies to implement projects toward the realization of this long-term vision of downtown.

What is a Strategic Plan?

Board Source™, a national nonprofit organization whose mission is to advance the public good by building exceptional nonprofit Board and inspiring Board service, defines a Strategic Plan as a written document that defines an organization's over-arching strategies and major areas of work for the next three to five years to achieve the organization's mission.

Strategic plans for nonprofit organizations are created through a process that builds on research to accumulate wisdom about the organization, its environment, economic potential. This process involves stakeholders to assure that the resulting Strategic Plan contains a comprehensive understanding of the preferred future of the organization.

NEW MISSION AND VISION STATEMENTS

As part of the Visioning and Strategic Planning workshop, we asked participants to review the existing mission and vision statements of the organization to determine if they are still valid, and to note if any changes were necessary. There were many comments made about both of these, so we provided new statements to compliment the overall new direction of the organization as discussed during the workshop.

What is a mission statement?

A mission statement articulates where the organization is now, not at some desired future point. An ideal mission statement identifies why the organization exists, who benefits, what the organization does and, finally, how it does what it does. A good mission statement conveys how the organization relates to its public and communities; why and how it enhances the well-being of others and improves quality of life; and, finally, what service it provides. A mission statement should be easily memorized, as it becomes a part of the “elevator speech” about the organization.

Current DSA Mission Statement

The Downtown Somerville Alliance exists to promote and enhance the economic well-being and growth of Somerville’s Historic Downtown District.

Suggested New Mission Statement

The Downtown Somerville Alliance (DSA) promotes, enhances and revitalizes Somerville’s downtown as a thriving commercial district and community-gathering place for residents, shoppers and visitors from Somerville, Somerset County and Central New Jersey.

What is a vision statement?

A vision statement describes the preferred future of both the organization and downtown after five years of work towards fulfilling the dreams of stakeholders. The vision statement should focus on the community impact and the power of the organization to transform downtown. A good vision statement is ambitious enough to force people out of comfortable routines, and is conceptual but practical, taking advantage of fundamental trends from consumer research. A vision statement should be clear enough to articulate the visual changes in downtown.

Current DSA vision statement

In 2013, Historic Downtown Somerville will have a destination retail mix consisting of of unique, individually owned and brand name stores and restaurant to create sustainable consumer demand. The downtown will have a lively, inviting day and nighttime environment for residents, visitors, workers and professionals. Our Main Street will be Somerset County’s downtown, hosting signature and recurring events that attract new audiences.



Proposed New Vision Statement - Our Vision for Somerville in 2018.

By 2018, historic Downtown Somerville will be recognized as Somerset County's downtown where residents and visitors find a thriving commercial district with more than 100 independent and brand name shops, restaurants and entertainment options.

Customers will fill our downtown during the week, as they walk or bike to work in Somerset County offices, or to appointments with the many fine professional service providers in town. On weekend days, downtown will be crowded with young families running errands and those couples and singles born post-World War II. They will also be able to take in the latest fashions and accessories at a growing number of fine, independent boutiques. Somerville is jam-packed on both Friday and Saturday nights, as downtown continues to be an award-winning restaurant destination. New Jersey Magazine and other news outlets shout about our downtown as the fine dining hub of Central New Jersey.

Five years from now new entertainment options will abound. The opening of a new small movie theater showing independent films will complement the existing clubs, galleries, arts venues and live theaters. All genres of music are available most nights at our cafes, small performance spaces, coffee houses, pubs and restaurants. Public art displays rotate. All of the arts in downtown, whether found in galleries or theaters, enliven our streets, promote foot traffic and enhance the economic success of our district.

The recently completed streetscape revamp has been a total success. Lush greenery shades pedestrians in summer, and provides visual interest in spring and fall. The district pops with color from the flower baskets, banners and seasonally planted decorative flowerbeds installed by the DSA. The new façade lighting program enhances the authentic character of our downtown buildings.

Working closely with the Borough, the DSA has worked hard and invested SID dollars to solve the parking problem downtown through a reimagined parking management system and new parking management entity. The well-regarded way-finding system has new kiosks to show pedestrians where to find their favorite store or restaurant.

The district is highly managed with the DSA taking responsibility for all aspects of the customer experience including event planning, way-finding and its traditional role in assuring that the downtown is safe and clean. Downtown Somerville's historic buildings continue to be well maintained and celebrated.

New, appropriate, uses are found for the rare vacancy that occurs. When a storefront does become available, there are several potential tenants because the DSA maintains a listing of interested local and national retailers. The DSA is the "go to" place for those who wish to locate or expand downtown. The recent spate of award-winning new construction compliments the existing historic buildings, bringing vital new uses to the district.

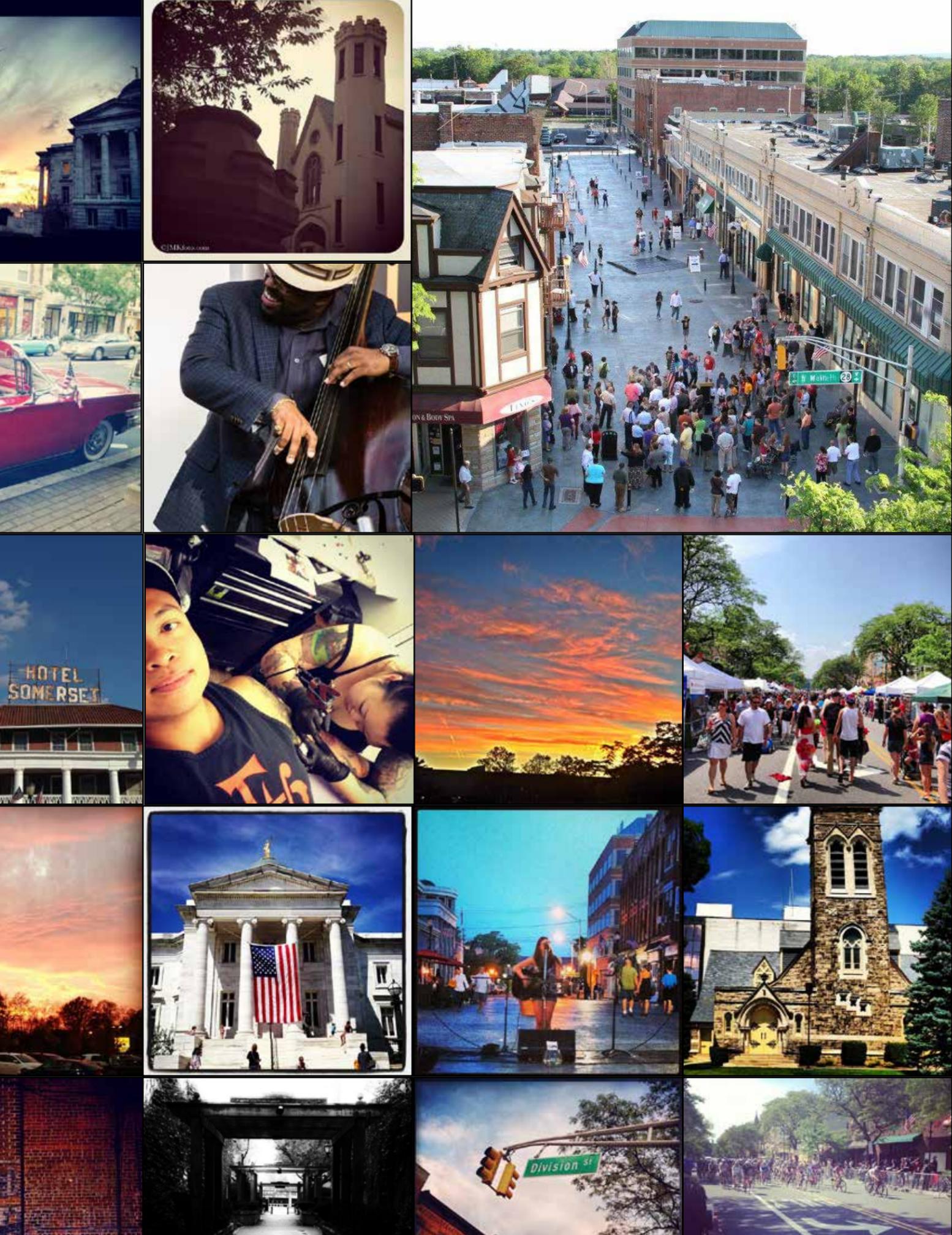
The DSA partners with many other organizations that host regular special events throughout the year that reinforce our vibrant street scene. The sidewalk cafes, weekly farmers market, entertainment venues and seasonal special events keep the sidewalks and parking garages full virtually year-round.

The DSA works closely with merchants to promote a handful of high quality and creative retail events each year that appeal to the variety of market niches in the district. Shoppers find what they want downtown because the DSA invests in periodic market research to understand its customers. Merchants actively cross market each other through coupons, referrals and bounce back programs. Innovation is the key, and the DSA continually invests in new marketing technologies.

The 2018 DSA budget is three quarters of a million dollars. There is superb Board and staff leadership. More than 250 volunteers on the roster provide leadership for and mount the award winning special events and retail events. Over 8,000 volunteer hours were expended in 2018 and partnerships with the area's civic and religious organizations are highly developed and beneficial to both parties. The yearly sponsorship calendar is eagerly anticipated and partners vie to become premium sponsors of our events. The DSA continues its long-standing, productive and cordial working relationships with the Borough, the new Parking Authority and Somerset County. Downtown Somerville has become a truly regional destination for shopping and dining in Central New Jersey.

Strategic Goals

The goal-setting portion of the June 25, 2013 workshop helped to take the long-term vision and create a specific future direction for the downtown. Committee members formulated these goals. They neatly fit within the traditional purview of the Marketing, Events, Beautification and Economic Development Committees/ Teams. Team members prepared a brief statement of the overall goal of their committee in the future. They were asked to be specific about the outcome of five year's work. The following are the future strategic goals for downtown Somerville as prepared by each of the teams and the Executive Committee at the June 25, 2013 evening workshop.



2013-2018 SOMERVILLE STRATEGIC GOALS

- Manage and cultivate the downtown business mix by actively recruiting complimentary businesses. Retain existing retail, restaurant and service businesses. Continue to be an effective advocate for overall economic development activities in downtown Somerville.
- By 2018, the annual operating budget of the DSA will be \$750,000, raised from vendor fees, an expanded sponsorship program and supplemental funding from the Borough from Payments in Lieu of Taxes (PILOT). Continue and expand our extensive communication efforts to tell people about our work and about Downtown Somerville. We will recommit to the Main Street Four Point Approach™ and involve hundreds of volunteers who donate their time to our work. Continue to partner and collaborate with other organizations and pursue a merger with the Somerville Business and Professional Association.
- Continue to promote Division Street as the central gathering space for our historic downtown, promote our built heritage and continue to foster revitalization and beautification of our streetscape and historic buildings.
- DSA's extensive yearlong calendar of retail and special events cater to area families and specific market niches.
- Our award winning marketing and advertising program that uses traditional and new media, brings ever-increasing numbers of people downtown. Downtown Somerville has become a truly regional destination for shopping and dining in Central New Jersey.

The five Strategic Goals serve as the bridge to the new vision for the future of the downtown district in Somerville. All of the short and longer-term projects (individually and collectively) move the organization towards making this vision into a reality by allocating all of its financial and volunteer resources accordingly.

The activities and programs that the Downtown Somerville Alliance implements in the future, through the combination of Board, staff, committees/teams, partners and individual task force volunteers, all must be aligned to achieve at least one (1) of the five (5) Strategic Goals as outlined above. If a project does not clearly meet any of the Strategic Goals, the project should neither be staffed nor funded, as the organization has a finite number of volunteers and financial resources.

Role of Work Plans

Work plans for each project are completed by the volunteer committees/teams and are approved by the Board. The work plan provides detail on how to implement an effective project. Every work plan contains the following elements: Who (person or partner organization), What, When, How Much Cost, How Much Income, Volunteer Hours, Staff Hours and of course, the Strategic Goal(s) met. Collectively, these work plans become the substance of the materials submitted to the SID property owners and the Borough for support each year. The Work Plan can be used to sell sponsorships, as well as to assertively market the volunteer and collaborative opportunities therein to individuals and groups of current or potential stakeholders.

Staffing and volunteers

This Strategic Plan sets out a very ambitious improvement agenda for the DSA over the next five (5) years. All of these activities are important and worthy, but the DSA Board must reach agreement about how it will staff these activities.

While there are already some volunteers involved with the organization, there are not enough to implement even a small portion of these activities. The current staff cannot take on any more duties, as it is already significantly overstretched. New staff, particularly an events coordinator is critical for the continued success of the organization's ambitious agenda.

If the DSA Board, along with teams and new volunteers, is to be responsible for implementing these tasks, then the Board must continue to invest substantially in volunteer infrastructure. New systems will be needed, including more volunteer job descriptions, updated databases, volunteer recruitment drives, volunteer training and continuing the annual recognition event. Leadership for any new volunteer effort must come from the Board itself, primarily in the form of promoting volunteer recruitment throughout the teams and organization as a whole.

Conclusion

This 2013-2018 Strategic Plan for downtown Somerville is a review of the past performance of the organization and a representation of its bright future. This Strategic Plan contains new mission and vision statements. The five Strategic Goals mentioned above organize the rest of the document and should be used to guide all of the organization's work in the next five (5) years, which is the useful life of this planning document.

ECONOMIC DEVELOPMENT COMMITTEE

Strategic Goal: Manage and cultivate the downtown business mix by actively recruiting new complimentary businesses and retain existing retail, restaurant and service businesses. Be an effective advocate for overall economic development activities in downtown Somerville.

Responsible Committee: Economic Development

- Understand the current market downtown
- Update existing business inventory including first floor and second floor businesses in the district. Maintain this data on the business directory portion of the Downtown Somerville web site
- Use the Market Analysis and recently completed Consumer and Stakeholder Survey to refine marketing materials for business recruitment and retention purposes in the downtown. Create new materials as needed. Conduct additional workshops as needed with area merchants to help them use this information to expand their product lines or refocus their business to take advantage of downtown customer preferences.
- The Consumer and Stakeholder Survey noted that 44% of the current customers in downtown Somerville live in Somerset County not Somerville itself. Use this information to refine any advertising for DSA, and make existing merchants aware of this information so they can adjust their media buys accordingly.
- Make the Online Survey results and Market Analysis widely available especially to existing restaurants so they understand current downtown shopper preferences.
- Post the Market Analysis, Online Survey and this Strategic Plan on the DSA website. Recruit new complimentary businesses
- Strengthen relationships with area commercial real estate brokers that represent most of commercial properties in downtown
- Create a new simple sell sheet for downtown and for specific commercial properties, make these available as PDF document on web site and distribute to brokers and others.
- Create a "How to open a business in Somerville Fact Sheet" and post on the organization's web site and on the Borough of Somerville web site. Make this fact sheet widely available, especially at the local Small Business Development Center and other economic development entities.
- Target specific business types for recruitment from the Online Consumer and Stakeholder Survey completed in 2013.
- Create a small committee of board members, business owners and other volunteers to assist DSA staff in making calls and visits to prospective tenants for vacant spaces in downtown.
- Retain existing businesses
- Widely disseminate the recent Market Analysis and Online Consumer and Stakeholder Survey information to existing merchants and work with them to alter their product mix to appeal to the current downtown shoppers as noted in this current market research.
- Regularly visit existing business to keep up to date on their concerns, business promotions and expansion plans.
- Reorient staff dues to permit business recruitment activities
- Increase the DSA staff and shift responsibilities so that the Executive Director can devote a majority of her time to focusing on business recruitment activities.
- Monitor the district
- Continue to supply Main Street New Jersey with the district's Reinvestment Statistics as required and widely promote any successes in attracting new business, new investment and new jobs in the downtown district.
- Continue to work closely with Mayor and Council on parking management plan to include merchant parking, fee structure and joint funding of a parking deck (deck is capital project).

EXECUTIVE COMMITTEE

Strategic Goal: By 2018, the annual operating budget of the DSA will be \$750,000, raised from vendor fees events, an expanded sponsorship program and supplemental funding from the Borough from Payments in Lieu of Taxes (PILOT). Continue and expand our extensive communication efforts to tell people about our work and about Downtown Somerville. Recommit to the Main Street Four Point Approach™ and involve hundreds of volunteers who donate their time to our work. Continue to partner and collaborate with other organizations and continue to pursue a merger with the Somerville Business and Professional Association.

Responsible Committee: Executive Committee

Board leadership

- Create a standing committee of the DSA Board dedicated to coordinating the overall fundraising and revenue diversification efforts of the organization.

Budget

- Work with City Council to increase the Special Improvement District property tax assessment from the current amount to more than \$300,000 by 2018 to pay for more services and activities that benefit all downtown property owners.
- Review the current boundaries of the SID district, and the district's property list.
- Continue to evaluate development agreements for properties in the downtown district. Partnerships
- Continue to work closely with Mayor and Council on parking management plan to include merchant parking, fee structure and joint funding of a parking deck (the parking deck is capital project).
- Significantly expand our existing partnership efforts by targeting the following new partners: Duke Farms, Somerset County Community College and Somerset County Tourism Council.
- By 2018, the DSA operating budget will grow to be \$750,000. Revenue sources will be diverse, including Borough and Somerset County government; sponsorship, special events fees, grants, SID assessment and from Payments in Lieu of Taxes (PILOT) fees from Borough government.

Volunteers

- Expand our volunteer pool through aggressive recruitment at DSA sponsored events at a volunteer table staffed by volunteers.
- Identify volunteers to develop simple volunteer job descriptions for specific volunteer tasks (writer, designer, accountant, etc.). In addition, promote these opportunities on the new website, Facebook page and e-blast newsletter.
- The DSA Staff will review the current volunteer database and make sure information is complete in each record (name, home phone, cell phone, email, address etc.).
- By 2018, our annual volunteer appreciation event will be considered an important annual event in town

Communications

- Continue our well-regarded communication efforts to promote our organization and downtown. Continue the e-newsletter, update the website, continue our social media efforts (Facebook, Twitter etc.) and other advertising and PR efforts. Regularly evaluate our marketing efforts by conducting surveys at events, online, and through broad outreach to downtown customers.

EVENTS COMMITTEE

Strategic Goal: DSA's extensive yearlong calendar of retail and special events cater to area families and specific market niches.

Responsible Committee: Event

New staffing

- Create a full time events coordinator position at DSA, the person will spend half their time programming Division Street, the other half working on existing events in downtown. This position might overlap with existing Borough activities and could be a contract position.
- Involve more volunteers in events
- Build a larger event volunteer database by creating short volunteer job descriptions. Post these on the organization's web site, promote in the regular e-blast, on Facebook, and at a volunteer booth at each downtown event staffed by another volunteer. Follow up with any potential volunteer within 48 hours, and refer the potential volunteer to a team chairperson or event chair within a week.
- Undertake more committee outreach for volunteers. Create a speaker's bureau to have board members and other volunteers speak at existing organizations to spread the word about the DSA and our volunteer needs.
- Increase sponsorship opportunities for events
- Substantially revise and expand sponsorship opportunities for existing special events. Work closely with the Executive Committee and DSA staff to significantly expand our sponsorship solicitations for existing events.
- Monitor existing events
- Conduct simple evaluations of each event, to determine volunteer and attendee satisfaction.
- All event committees/teams should review the profit/loss for their event as soon as it is complete, and adjust the work plan for the event next year.
- Eliminate or substantially change any special event that does not reinforce current marketing effort.
- Host fewer but more robust special events.
- Work with merchants to help them get new customers from the hundreds of people who
- attend downtown special events.

Retail events

- Work with merchants to review the existing retail events to assure that the events are meeting their needs. Make adjustments as needed.

BEAUTIFICATION COMMITTEE

Strategic Goal: Continue to promote Division Street as the central gathering space for our historic downtown, promote our built heritage and continue to foster revitalization and beautification of our streetscape and historic buildings.

Responsible Committee: Beautification

Streetscape

- Establish a plan to replace existing tree planters with trees and grates over the next five years. Have the plan approved by all appropriate bodies, and implement. The DSA will fund these replacements out of its budget.
- Develop a façade lighting plan to highlight the architectural details of our historic buildings. Develop a fund to encourage property owners to light their properties in accordance with a plan the DSA develops.

Maintenance

- Continue to maintain and beautify downtown through planting flowers, hanging baskets, banners, planting flowerbeds and regularly cleaning the downtown.
- New capital projects
- Create a focal point for Division Street such as a gateway, sculpture or fountain to reinforce it as a central gathering place for the downtown. Create a task force to design, fund and implement this public art project.
- Continue to add to the existing way-finding system in downtown as needed. Add strategically located kiosks with downtown maps for pedestrians showing the location of all shops, parking, service businesses and restaurants.
- Continue to budget, plan and complete capital projects in the SID on a yearly basis. Provide good design advice
- Consider whether there is interest in placing the downtown on the National Register of Historic Places so that commercial property owners would become eligible to take advantage of the 20% Federal Investment Tax Credit for Rehabilitation.¹ This
- ¹ <http://www.state.nj.us/dep/hpo/3preserve/36cfr67.htm> and <http://www.nps.gov/tps/tax-incentives/taxdocs/about-tax-incentives-2012.pdf>
- longstanding federal tax incentive, could spur redevelopment of the large stock of historic buildings in downtown Somerville, if the downtown was listed on the National Register.
- Continue to provide good advice for any property owner or business owner who wishes to make improvements or restore their historic building.

MARKETING COMMITTEE

Strategic Goal: Our award winning marketing and advertising program uses traditional and new media to bring ever-increasing numbers of people downtown. Downtown Somerville has become a truly regional destination for shopping and dining in Central New Jersey.

Responsible Committee:

Marketing

- Create work plans for all events so that the Board can track them on a monthly basis. Review profit/loss after each event to determine if changes are needed.
- Recommit to our downtown brand and a 20-year vision for downtown.
- Downtown Somerville has more than 40 restaurants that cater to all tastes and price points. Downtown is recognized as a major restaurant destination. Allocate dollars and actively market the downtown as a restaurant destination to Central New Jersey and Somerset County.
- Promote downtown retailers more on the new DSA web site.
- Review and revise the advertising and marketing efforts for events and activities. The 2013 Online survey identified that our customers are coming from Somerville, Somerset County and from greater Central New Jersey. Review our advertising buys given this new information
- Continue our aggressive effort to collect email addresses and add these names to our e- blast list so that it continues to grow beyond the 5000 current names. Continue to send our regular e-blasts to this large and vibrant readership.
- Continue to invest in social media. Maintain an active presence on Facebook. Continue and expand the DSA Pinterest page.
- Teach more merchants how to use Facebook and other social media tools to promote their businesses and cross-market with the DSA.

Visioning and Goal Setting Participants

1. Thomas Genova DSA Board Chair
2. Patrick Mannion DSA Vice Chair
3. Rick St. Pierre Treasurer
4. Bonnie Allen Secretary
5. Rand Pitts Trustee
6. Steve Peter Trustee
7. Robert Petix Jr. Trustee
8. Jan Lush Trustee
9. Jane Kobuta Borough Council President, Borough Liaison
10. Beth Anne Macdonald Executive Director
11. Maryann Reh Administrative Assistant
12. Amanda O'Neill Borough Council
13. Bernie Navatto Planning Board Chair
14. Lisa Yates, Planning Board Vice Chair
15. Anthony Ianniello District Property and Business Owner
16. Greg Storms District Property Owner

Donna Ann Harris, Heritage Consulting Inc. Facilitator
Moira Nadal, note taker

Credits

Donna Ann Harris wrote this 2013-2018 Strategic Plan for the Somerville Downtown Alliance. Donna Ann Harris is the principal of Heritage Consulting Inc., a Philadelphia-based consulting firm that works nationwide in three practice areas: downtown and commercial district revitalization, historic preservation and nonprofit organizational development. Prior to starting her firm eight years ago, Ms. Harris was state coordinator for the Illinois Main Street program for two years and the manager of the Illinois suburban Main Street program for four years. During her tenure, Ms. Harris served 56 Illinois Main Street communities, led a staff of 12 and managed a budget of over a million dollars. Prior to her Main Street career, Ms. Harris spent 15 years as an executive director of three start-up and two mature preservation organizations, each with its own organizational and fundraising challenges. Prior to her Main Street career, Ms. Harris spent 15 years as an executive director of three start-up and two mature historic preservation organizations in New Jersey, Illinois, Philadelphia and Bryn Mar PA. Since starting her firm, Ms. Harris has worked with state, regional and local Main Street programs in 22 states. She has written five feature articles in The National Trust Main Street Center's monthly journal Main Street News, and scholarly articles in the American Association for State and Local History's History News and the National Trust's Forum Journal.

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