

Legacy Business Program Toolkit – Organizational Structure Checklist

Authority

- Create and approve the foundational policy that provides the legal authority for the legacy business program.
- Identify any governmental officials or advisory commissions involved in the program reviews.

Funding

- Create and approve the financial policy that funds the legacy business program.
- Establish dedicated funds for participants in the legacy business program.
- Investigate, approve, and establish any tax-based funding (e.g., TIFs or TOTs).
- Develop the financial reporting, auditing, and compliance standards for the program.

Placement

- Establish which municipal department or community organization will lead the program and define their role.
- Authorize any interdepartmental partnerships or supporting roles needed (e.g., finance department).

Personnel

- Identify the required roles and create an organizational chart, including how the organization can scale.
- Define job titles such as program managers, business case managers, and community outreach specialists.

Process

- Formalize the application process and outline its steps, emphasizing accessibility and equity.
- Formalize eligibility metrics and define stakeholder participation.
- Outline the review and confirmation process and required resources.
- Establish platforms and technologies for public program visibility (e.g., online registry).

Business Support

- Identify and establish business support offerings for legacy business owners.
- Identify internal and external partners to perform business support services.
- Create an accessible discovery and application process for support services.

Economic Support

- Identify, establish, and fund economic support tools for legacy business owners.
- Identify, establish, and fund economic support tools for legacy business property owners.
- Create a qualification process for preservation funding.
- Create a process for working with external funding partners (CDFIs, CDCs).
- Create an accessible discovery and application process for economic services.

Internal Policy

- Develop internal standards (e.g., conflict of interest, human resources).
- Develop processes to monitor, review, renew, or cancel program participation.
- Establish requirements and schedules for financial reporting and impact tracking.

Stakeholder and Community Engagement

- Develop methods for collecting feedback from legacy business owners.
- Develop methods for collecting community feedback.
- Create programs and resources for collecting documentation and media (oral histories, interviews, photographs, videos).

Marketing and Communication

- Create branding and messaging guidelines.
- Outline a public awareness strategy (social media, press releases, public events).

Evaluation

- Establish performance metrics to measure program success.
- Create timelines and methodologies for performance reporting.
- Develop policies and processes for program evolution, feedback integration, and delisting.