Organization Settings

Before entering data, you will find it easier to have setup or input some basic information in the tools section of Maestro.

Settings & Tools

Organizational Settings

Ensure that your organization is setup correctly to make reporting and other functions easier as you begin to use Maestro.

Community Name

This would be the name your organization goes by locally. If your organization’s name is The Springfield Historical District, Inc. but you go by “The District”, you will want to put “The District” in this location.

Community Logo

Upload your organization’s logo. If you have a horizontal version of your logo, we recommend using that (though vertical will work). You can upload png (preferred) or jpg file types.

Mailchimp/Constant Contact Integration

If you have either of these services, connecting them from the beginning will be beneficial. You can read more about this and find the tutorial on these for specifics on how to set them up.

Coordinating Program

Please select if you are a member of either the International Downtown Association or the National Main Street Center (or both). If you are a member of the National Main Street Center, you will be asked to select your Coordinating Program.

Membership Levels

You can setup your membership levels that will be available to add to businesses.
Please note, if your organization has membership levels that include contacts (individuals), you will need to utilize the involvements.

Trainings

The trainings section allows you to enter the trainings that your organization holds and attends. These trainings will be included in your reporting.

Import Data

This section allows you to import data to the Maestro system in bulk. More details on this can be found in the Inputting Data section.

Widgets

Maestro gives you the ability to add a reporting widget to your website. This widget is customizable with year-to-date or all time numbers, icons, and basic styles.

You can copy the code and provide that to your web developer or add directly to your website.

Add Volunteer Hours

This tool allows you to add volunteer hours to the system in bulk. Simply type the contact(s) you want to add volunteer hours for, enter the total hours they volunteered, and the date. If there is an involvement you would select that and there is an optional notes section.

Note: you will enter the hours volunteered, not the total number of volunteer hours.
For example, if you had 10 people attend a meeting, you would enter their names and add 1 hour. Each of these people would then have 1 hour saved on their profile for that date, for a total of 10 hours. Entering 10 hours will save 10 hours to each person, resulting in 100 total hours.

Billing

If you have access to Billing, this will link you to the billing section where you can update payment methods and see Billing history.

User Access

This section will show you which users have access to your Maestro system, and their role.
Note: Access is given at the contact level, not in this section.

Donations

Prior to being able to utilize the donations section, you must first setup the donations settings.

Appeals

Adding appeals lets you track how you are asking for funds. Common appeals are in-person, direct mail, internet, etc.

Campaigns

Campaigns are the overall fundraising efforts your organization is undertaking, such as a capital campaign, annual fundraising drive, etc.

Funds

Funds are where you donations will go. This can be general operating, special funds, or any other location that you want to track.

Grants

Tracking the grants that the organization applies for and receives is an important element for downtown reporting. This section does not apply to grants that the organization is distributing, only those that you are applying for. If you want to track the grants that you distribute, we recommend utilizing Involvements.

Grants

For each Grant, you can enter the Name, Category, Description, Date of Application, Date of Award, Amount Requested, Amount Received, and a Note. The amount received will be reportable through the reporting based on the Date Awarded.

Grant Categories

We have added Grant Category so that you can organize all the grants you are managing. Once you have created the Grant Category you can assign Grants to those.

Involvements

Involvements

Involvements are Maestro’s tagging system. It may be helpful to think about Involvements as custom fields or tags. Involvements can be created for any attribute that the organization wants to

track. Involvements are the way to get data out of multiple spreadsheets and into one usable system to see each contact, business, or
property's complete engagement with the organization. Involvements can be added to any property, contact, work plan or business.

Involvement Categories

Having your involvement categories and your initial involvements created prior to loading data will make attaching those involvements much easier. It is important to have a planned naming structure for your involvements so that you can keep track of them down the road. Please see the section on involvements for specifics.

Community Investment

In the initial organization setup, you may want to add your Parks and Public Parking information which will be available in reporting. This can also be done at a later date if that information is not readily available when you do your setup.

Public Improvements

Public Improvements are the tangible improvements made in your downtown. Public infrastructure projects, etc.

In the Public Improvements, you have an option to check whether they are private dollars that were use. For example, if you have a mural project that cost $100,000 and 80% was funded with private dollars and 20% was funded with municipal dollars. This would be considered a public improvement because it is a public project.
You would enter this project twice:

4th Street Mural	$20,000.00 (Private Dollars)	06/12/2020	
4th Street Mural	$80,000.00	06/12/2020	

Public Investments

Public Investments are the income that your organization receives for operations (or to carry out projects such as cleanup projects, etc). A good rule of thumb is that tangible items are improvements and cash is investments.

Parks

Understanding the assets within your district mean that you need a place to input parks, including location and amenities.

Public Parking

This section allows you to add all of the public parking within your district. Within each public parking option, you can enter:

- Name (can be a public lot or Main Street)
- Location
- Coordinates
- Number of Public Spots (non hourly)
- Number of Hourly Spots
- Number of Accessible (ADA) Spots
- Number of leased spots

If this is on-street parking, make sure that you toggle the On Street Parking button to the on position.

Properties

Prior to inputting data, you will want to have this section complete so that you can use these fields to attach your incoming data.

Registries

Registries are any subset of your properties. They do not have to be contiguous. The most common registries are National Register of Historic Places, Local Landmarks, etc. You can also use these if your downtown has
geographic zones that you want to identify.

SSA/BID

Special Service Areas (SSAs) or Business Improvement Districts (BIDs) can be entered here. These districts may go by other names such as Community Improvement Districts, etc. Once you have added your SSA/BID name to this list those zones will be available to attach to properties within your Maestro account. You may create multiple SSAs/BIDs within your downtown, but you may only attach one SSA/BID to a property.

TIFs

TIFs, or Tax Increment Financing Districts are a common taxing tool for downtown organizations. Once you have added your TIF name(s) to this list those will be available to attach to properties within your Maestro account.
You may create multiple TIFs within your downtown, but you may only attach one to a property.

Zoning

This is where you would add your downtown’s zoning districts. Once you have added the zones here they will be available to attach to properties.

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