Mastering the Annual MainStreet/ACD Performance Review

Webinar Topics

1. Overview, process and timelines
2. Certification/accreditation
3. Compliance issues
4. Surveys and dashboard
5. Work plans
6. When/where to participate
7. The Four Point Refresh
8. Board essentials
9. Lessons from the Field
10. Follow up

The GoToWebinar Interface

1. 20 minute presentation via “audio only” mode
2. Webinar controls
3. Listen on computer/device or by calling in to the conference #
4. 10-40 minutes for Q&A (type in question box)
Assessment Overview

Why the review?
- Misconceptions
- Understanding Performance, Direction
- Legislative Reporting
- Nat’l Main Street Center Reporting
- Performance Management

What info is needed?
- Required for compliance
- Adherence to Standards
- Projects: Performance, Achievement
- Stakeholder Participation

How is the data collected/used?
- Service Reports, dashboards, project summaries, surveys, site visits, other communication
- Overall goal is planning and coordination (resource allocation, trainings, project coordination)

Role of the Local MainStreet/ACD Affiliate

1. Serves as a centralized infrastructure with dedicated staff to lead the revitalization process.
2. Structures processes that lead to common economic development goals
3. Assumes responsibility for shared performance on economic development projects via the Four Points
4. Maintains continuous communication with stakeholders
5. Constantly support participants and activities to build incremental successes.
6. Implements economic development goals and strategies and monitors economic development outcomes.
The Review Process

1. Service Reports
2. Reinvestment Data
3. Compliance Requirements
4. Work plans
5. Four Point Project Summaries
6. Online Surveys
7. Site Visits
   a. Staff
   b. Partners
   c. Boards
8. Recommendations

2015 Agendas and Timelines

2015:

9/14: Downtown Las Cruces Partnership
9/15: Deming
9/16: Silver City MS & ACD
9/21: Gallup MS/ACD
9/22: Grants
10/5: Clayton MS
10/6: Raton MS/ACD
10/11-10/14: South Valley Resource Team
10/19: Mora Arts & Cultural Compound
10/20: Belen
10/26: Alamogordo
10/27: Truth or Consequences

2016:

1/5: Tucumcari
1/6: Portales
1/7: Clovis
1/11: DowntownAbq MS/ACD
1/12: Nob Hill
1/14: Las Vegas MS and ACD
1/19: Farmington
1/20: Los Alamos MS & ACD
1/21: Corrales
1/26: Carlsbad
1/27: Artesia MS & ACD
2/2: Lovington
2/3: Roswell

Certification / Accreditation

State Certification:
• Org. meets minimum participation requirements
• All compliance documents current
• Evidence of projects/progress in each of the Four Points

National Accreditation:
• Evidence of achievement and high performance under NMSC's Ten Performance Standards

Emerging, Start Up, and Partner Affiliates
Compliance Requirements

One Time
- IRS Form 1023
- Bylaws/Amendments
- Conflict of Interest Policy
- Records Retention/Destruction Policy
- Whistle Blower Protection Policy
- Fiscal Controls/Financial Management Policy

Recurring
- Annual Work Plan
- FY Operating Budget
- Board Roster
- Conflict of Interest Disclosures
- IRS Form 990
- NM Secretary of State Registration
- NM Attorney General Registration
- LOA/MOU with local government (biannual)
- Annual Summary of Activities (2 pages)

Surveys and Other Reporting Tools

MainStreet
- Annual Salary/Budget Survey (October)
- Board/Staff Survey (30 days prior to site visit)
- Partner Survey (30 days prior)
- Summary of Activities (7 days prior)
- Quarterly Reinvestment Reports

Arts & Cultural Districts
- Annual Salary/Budget Survey (October)
- Annual Creative Economy Survey
- Semi-Annual Reinvestment Report
- Partner Survey (30 days prior)
- Summary of Activities (7 days prior)
- Quarterly Reinvestment Reports

Digital dashboard

Tutorial:
- Logging in
- Updating
- Checking In

State Certification
- The following steps are required for a local MainStreet to be eligible for funding: (1) Submit the MainStreet Nomination Form, (2) Meet the MainStreet Eligibility Criteria, (3) Complete the MainStreet Certification Requirements, (4) Submit the MainStreet Certification Application, and (5) Attend the MainStreet Certification Webinar.

Excellence Director Training and Certification
- The following steps are required for an Excellence Director to be eligible for certification: (1) Complete the Excellence Director Training, (2) Meet the Excellence Director Eligibility Criteria, (3) Complete the Excellence Director Certification Requirements, (4) Submit the Excellence Director Certification Application, and (5) Attend the Excellence Director Certification Webinar.

National Accreditation (Optional)
- The following steps are required for a MainStreet to be eligible for accreditation: (1) Complete the MainStreet Accreditation Application, (2) Meet the Accreditation Eligibility Criteria, (3) Complete the Accreditation Requirements, (4) Submit the Accreditation Application, and (5) Attend the Accreditation Webinar.

Document Repository
- The following documents are required for MainStreet Accreditation: (1) MainStreet Nomination Form, (2) MainStreet Certification Application, (3) Excellence Director Training Certificate, (4) Excellence Director Certification Application, and (5) Accreditation Application.

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Work Plan Essentials

- Collaborative, Community Driven?
- Rooted in Master Plan, Cultural Plan or other Community Transformation Vision?
- Incremental Projects/Activities?
- NOT just a compliance document!
- Resources: money, people
- Timelines, Responsibilities
- Project Implementation Plans (PIP)
- Year-round process
- Board-adopted

Participation – Who, When, Where

1. MainStreet Executive Director ONLY (~1 hr)
2. Local Government (and other) Partners ONLY (~1 hr)
3. MainStreet Board of Directors ONLY (~1.5 hrs); 80% participation
4. Working session: Staff, Board, Volunteers

Community Transformation Vision

*Source: National Main Street Center*
Connecting Four Points Projects to Asset-Based Economic Development Strategies

**Strategy:** Capture more local consumer dollars by helping existing businesses to better serve local residents.

**Outcomes:** Increases measured for, a) Sales in MainStreet district, b) Gross Receipts Taxes, c) car/pedestrian traffic, d) attendance at key events.

**Sample Actions/Outputs:**

<table>
<thead>
<tr>
<th>Economic Vitality</th>
<th>Organization</th>
<th>Design</th>
<th>Promotions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distribute market profile charts to 65 businesses.</td>
<td>Develop a local business asset map to guide the task implementation. Build relationships with property tax assessors to compile local/GTRF info.</td>
<td>Create a tactical urbanism interventions project in an empty lot using “lighter, quicker, cheaper” street and public art approach.</td>
<td>Produce an annual promotions and advertising package targeting residents.</td>
</tr>
<tr>
<td>Produce business enhancement seminar on local customer targeting (reach 25 businesses)</td>
<td>Conduct 40 business solicitations; engage owners in “Shop local” or networking events; recruit 30 partners/20 projects.</td>
<td>Create TIF district to establish sustainable funding source for street and public area enhancements and improvements.</td>
<td>Update website/business directory (link to businesses).</td>
</tr>
<tr>
<td>Provide in-store consulting to establish social media marketing program (5 priority businesses)</td>
<td>Establish a PR campaign highlighting your MainStreet business development goals.</td>
<td>Conduct a facade squad project at the Courtyard Café: paint walls, refresh planters, repair deck(s).</td>
<td>Implement a retail aware sidewalk stuff with cooperative/brand advertising and coupons.</td>
</tr>
</tbody>
</table>

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**Board Essentials**

- **Participation:** recurring vs. site visits
- **Communication:** Awareness, knowledge, understanding
- **Roles and Responsibilities:** Know and act on them
- **Accountability:** Active vs. Passive participation
- **Local Gov’t:** Money ≠ Partnership
- **Other partners:** (Really?)
- **Work plans**
- **Budgets and stats**

**Keys to Mastering the Performance Review**

1. Preparing (benefits of waiting)
2. Remember: Compliance ≠ Assimilation
3. Show Up
4. Board involvement (80/20 rule)
5. Play it straight
6. Local Gov’t: Money ≠ Partnership
7. Other partners (Really?)
8. Work plans
9. Budgets and stats
Keys to Mastering the Performance Review

10. Focus on economy
11. Communicate (freely)
12. When to show, when to lay low
13. The Defense Rests
14. Community participation = community driven
15. Making the grade – minimum requirements.
16. Not all who wander are lost (on innovation/communication)
17. Remediation vs. Restructuring

Follow Up, Follow Through

- **Recommendations:** Basic report (Next Day)
- **Compliance:** Up to 30 day grace period
- **Certification Result:** Immediate
- **“Partner” Designation:** Immediate
- **Accreditation:** No later than Feb. 10th
- **Findings:** Challenges only via written response to the State Director.

Questions?

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