

# Quarterly Reports

**What are they and how to get them done?**

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Presented by

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NEW MEXICO  
**MAINSTREET**<sup>™</sup>

# The Basics

**Quarterly Reports** -- tracking the performance of each local

NMMS organization

Businesses & Jobs

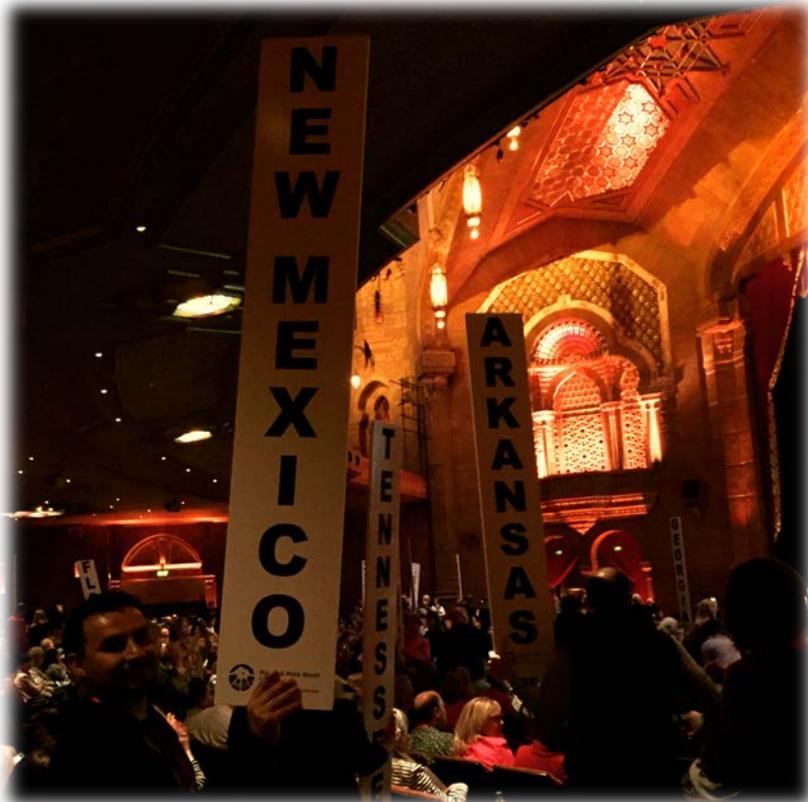
Building Purchases & Construction

Public & Private Investment

Grants

Volunteer Hours

Events & Promotions



# Quarterly Reports

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- There are two forms to fill out:
  - An excel form and a form that is filled out online via Salesforce.
  - You should receive an automatic message from Salesforce about the questionnaire.
  - You should fill out the excel form first and upload it to Salesforce.
  - Then fill out the questionnaire.
  - Please send me an email from your MainStreet org email; so we can verify your information has been updated. [Lucas.Pedraza@State.nm.us](mailto:Lucas.Pedraza@State.nm.us)
- Some basic guidelines:
  - Only report on activity within your MainStreet district boundary.
  - Create a system of tracking board and volunteer hours spent in meetings or working on projects.
  - Make a routine of walking or driving around your district to spot activity happening.
  - Always be prepared to contact people/businesses BEFORE the reporting deadline.



# Data Collection/Definitions

- Private building interior and exterior improvements/rehabilitations.
- New businesses opening.
- Businesses closing.
- Businesses expanding.
- FTE Jobs.
- Building Purchases.
- Public sector improvements.
- Public/Private projects.
- New private buildings being constructed.
- Grants your organization receives.
- Events and promotions you that have occurred.
- Housing development.
- Volunteer hours.



# Login

**Username**

**Password**

Login

[Forgot Your Password?](#)

Please enter your username and password to login.



Due Date Status Past Due

- ▶ **1. Overview**
- ▶ **2. Contact Information**

▼ **3. Workbook**

Save & Exit Save Previous Next Submit Report

= Required Information

## Workbook

Please download the worksheet here

**Question 6**

**Completed worksheet ?**  
no uploaded files

Upload your excel worksheet here. It is also a good practice to store these locally on your computer.

Save & Exit Save Previous Next Submit Report

= Required Information

Save & Exit

Save

« Previous

Next »

Submit Report



| = Required Information

## Business Openings, Closings and Expansions

### | Question 9

Total # of new businesses added

### | Question 10

Total # of jobs added from new businesses

### | Question 11

Total # of businesses closed

Make sure you fill in every box on every tab and page. Even if you don't have anything to report, enter a zero. Otherwise you will not be able to submit your report at the end.



**Total # of businesses closed**

**Question 12**

**Total # of jobs lost**

**Question 13**

**Total # of net new businesses (# openings - # closings)**

**Question 14**

**Total # of businesses expanded**

**Question 15**

**Total # of jobs added from expansions**

**Question 16**

**Total # net new jobs**

For categories where you would have a negative number, such as jobs lost, you can just enter the number of jobs lost. For categories that are a Net figure you can enter the negative sign. Please use numbers calculated in the excel.

## Mainstreet grants

- ✘ Total # of public sector grants
- ✘ Total amount of public sector grants (\$)
- ✘ Total # of private sector grants
- ✘ Total amount of private sector grants (\$)

## Mainstreet events and promotions

- ✘ Total # of events
- ✘ Total event profits (\$)
- ✘ Total # of promotions
- ✘ Total promotion profits (\$)

## Housing

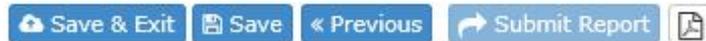
- ✘ Total # of housing projects
- ✘ Total value of housing projects (\$)
- ✘ Total # of housing units

## Volunteers

- ✘ Total number of volunteers
- ✘ Total # of volunteer hours

This is the final page. On the left you can see if you have inputted all required fields anything that has not been properly filled out will have a red X next to it.

This button will be filled in or highlighted once all fields have been filled out. Your report will not be complete until you click 'Submit Report'.



Done

Cancel

Thank You!

[nmmainstreet.org](http://nmmainstreet.org)



NEW MEXICO  
**MAINSTREET**<sup>™</sup>

ENGAGE PEOPLE • REBUILD PLACES  
REVITALIZE ECONOMIES



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