

New Mexico MainStreet 2024 Planner New Features:

- New File System for Maximum Customization
- More Note-Taking Space on Weekly Pages
- New Meeting Layouts
 - Full Page
 - Full Spread
 - Half Page
- New illustrations & Quotes
- New Blank Page Types (dot grid, lined, grid)



Print Notes & Tips

- If “saddle” or “perfect” bound, page count needs to be in **multiples of 4**. (*page count doesn't matter with spiral bound*)
- **Need extra pages?** Add in blank or notes pages provided.
- Even page numbers will be on the left. Odd page numbers will be on the right. (*covers are the exception*)
- Recommended Program: Adobe Acrobat
- Alternative (online): **pdfchef.com/rearrange-pdf-pages.html**

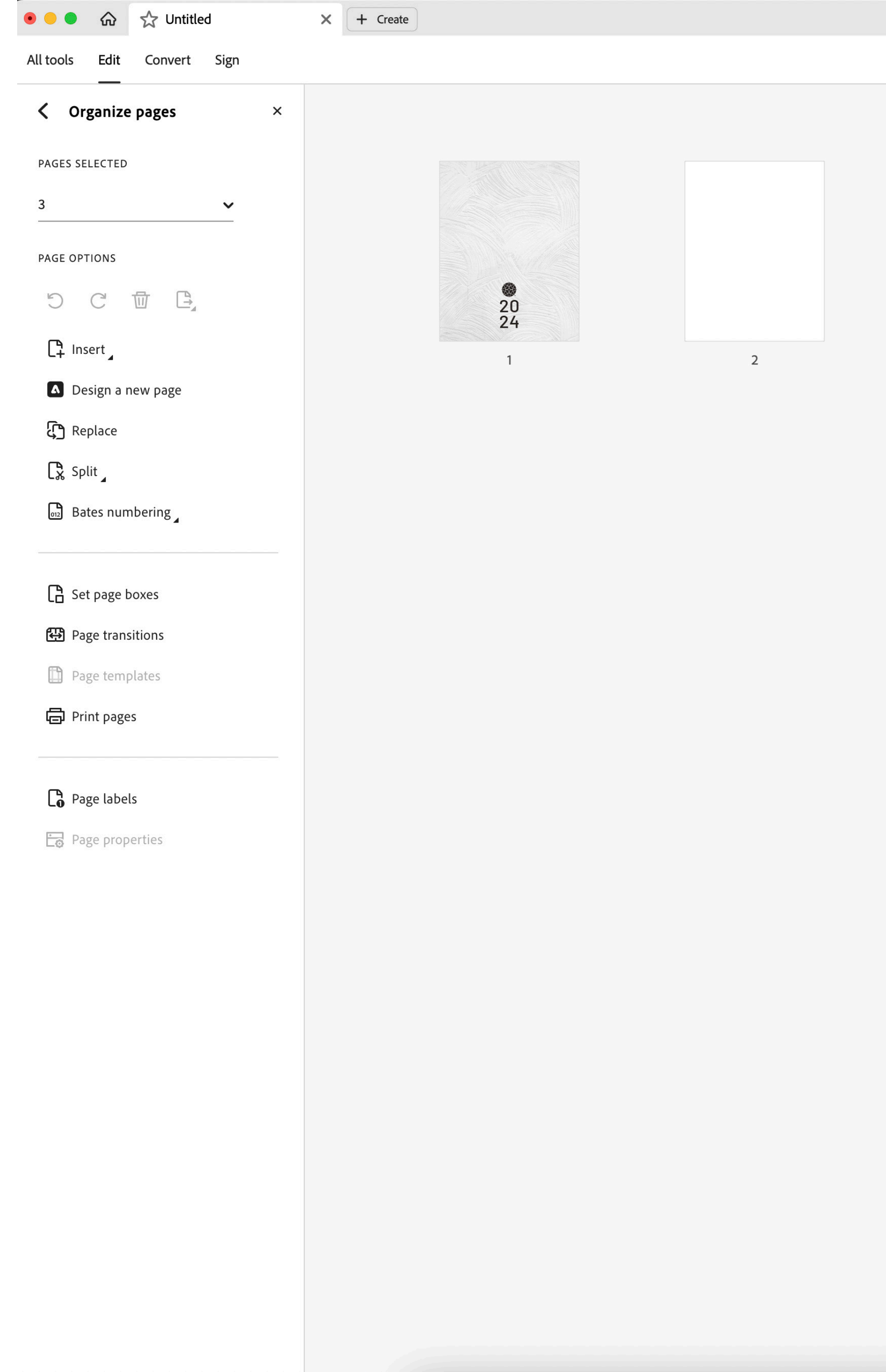


How to Start Building Your Planner

Adobe Acrobat

- Go to File > Create > Blank Page (this will be your inside cover)
- Drag in your desired page files (*or go to Insert > From File under Page Options*)
- Arrange/drag them as desired
- Once completed, save your new planner file!

- **You can add a blank page** by going to Insert > Blank Page under Page Options

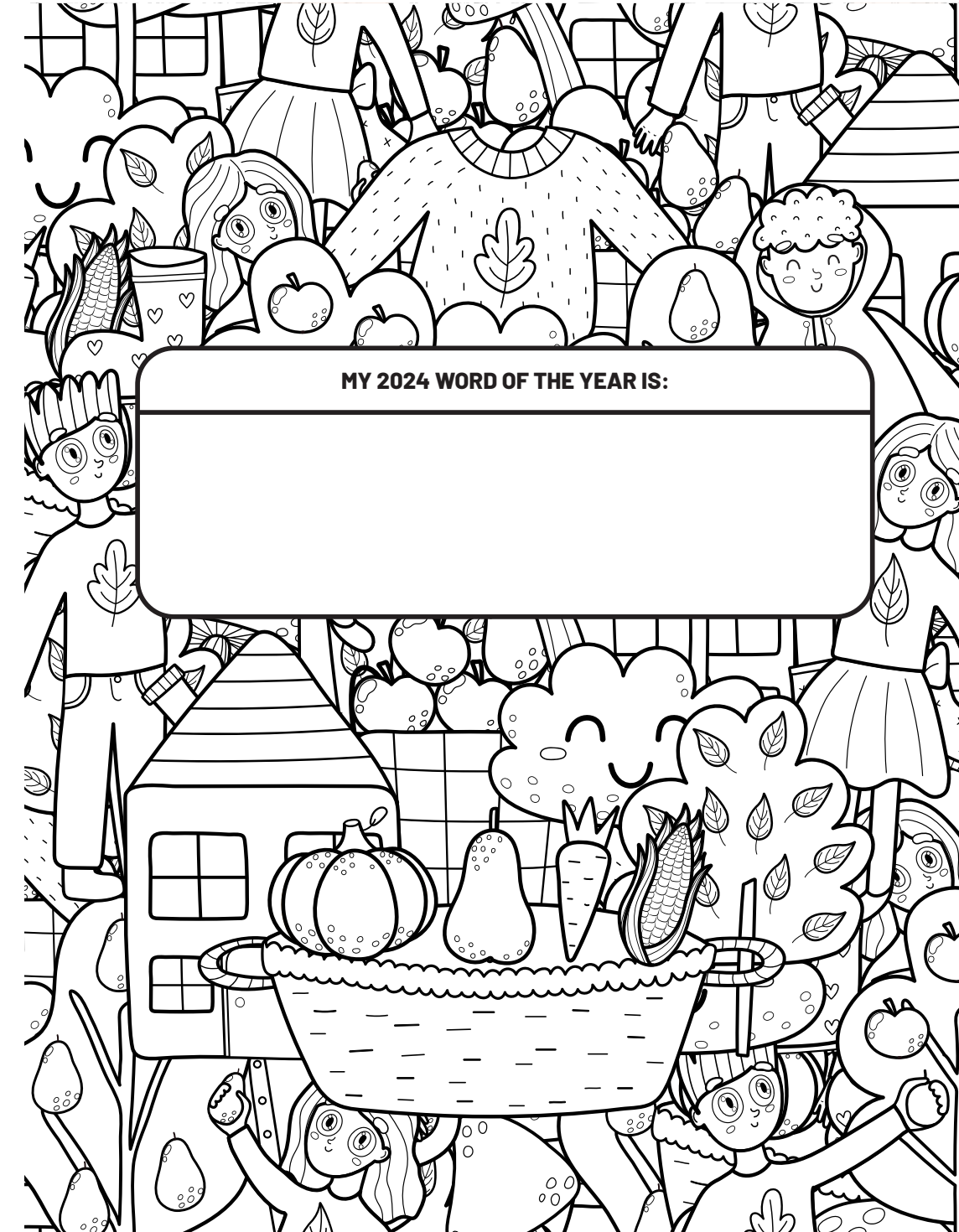


2024 Planner Files — Reference

DOWNLOAD
2024 NMMS PLANNER PAGES

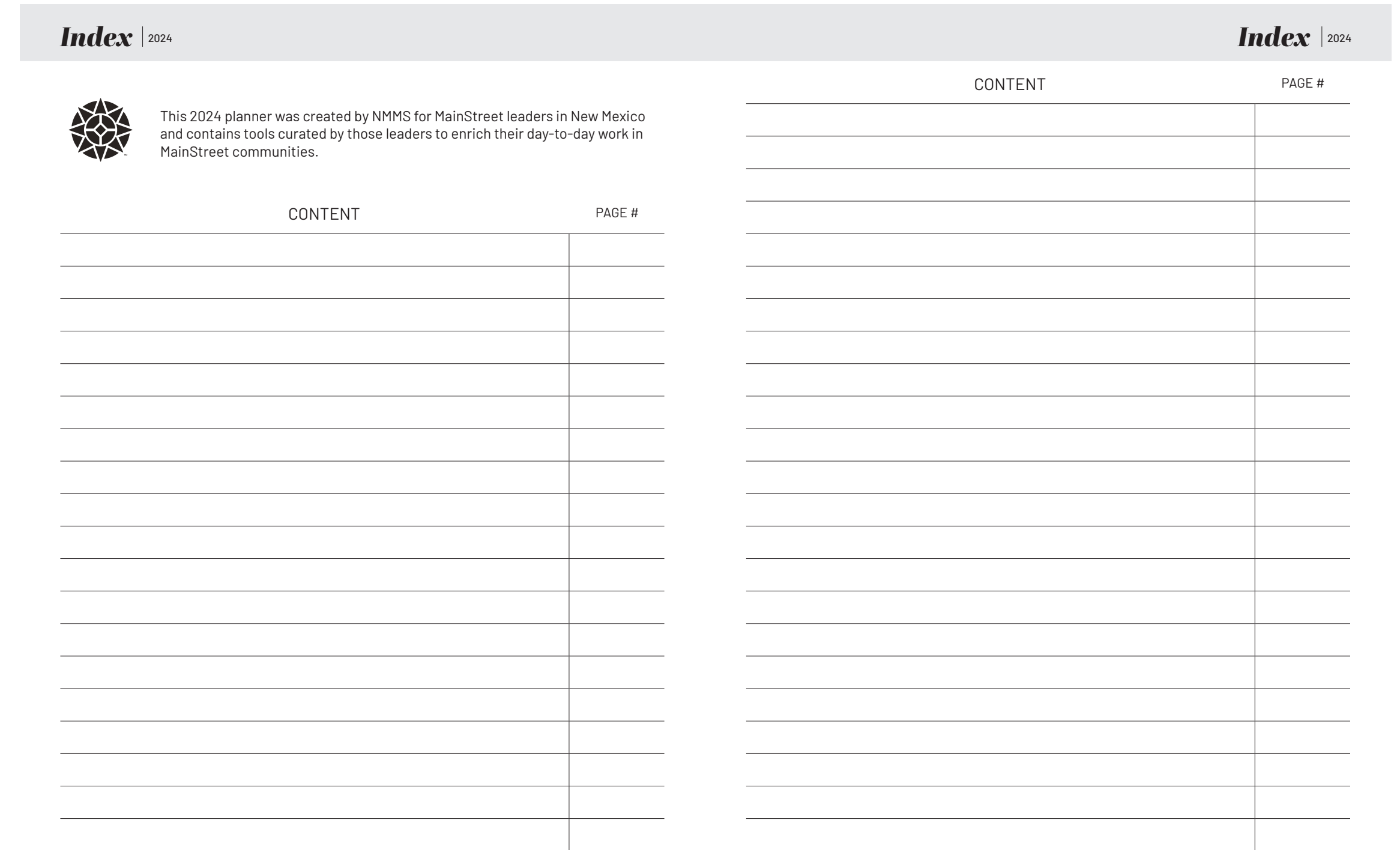


01 front page



02 word of the year

intro/front page



03 index

keep track of where important info is to reference later

2024 Planner Files — Reference

Future Log | 2024

[illegible]

OCTOBER

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

NOVEMBER

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

DECEMBER

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

1. NNMS Quarterly Reports

ECONOMIC TRANSFORMATION STRATEGIES · PRIORITIES · FOCUS

QUARTER 1

[illegible]

QUARTER 2

[illegible]

QUARTER 3

[illegible]

QUARTER 4

[illegible]

IDEAL WORK DAY/WEEK WORKSHEET

Maximize Productivity

5am	
6am	
7am	
8am	
9am	
10am	
11am	
NOON	
1pm	
2pm	
3pm	
4pm	
5pm	
6pm	
7pm	
8pm	
9pm	
10pm	

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
MORNING					
AFTERNOON					
EVENING					

MONTHLY DASHBOARD

[illegible]

04 future log

12-month view – the widest view of the year; mini calendars to input important dates in later months

05 quarterly ets & personal

set ETS priorities and goals by quarter;
also a section to set personal development
goals with a quarterly view

06 ideal routines

maximize productivity by outlining what your want your days and weeks to look like; when are you taking meetings? when are you not?

07 monthly dashboard

a running task list split into four sections that can be used monthly outline your most pressing tasks (idea! you can also split these into the four points and have tasks for each)

2024 Planner Files — Reference

[illegible]

MEETINGS	
<p>MEETING:</p> <p>.....</p> <p>.....</p> <p>MEETING DATE/TIME:</p> <p>MEETING NOTES:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>FOLLOW-UP/TASKS:</p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>
<div style="border: 1px solid black; padding: 5px;">NEXT MEETING:</div>	
<p>MEETING:</p> <p>.....</p> <p>.....</p> <p>MEETING DATE/TIME:</p> <p>MEETING NOTES:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>FOLLOW-UP/TASKS:</p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>
<div style="border: 1px solid black; padding: 5px;">NEXT MEETING:</div>	

MEETINGS		
<p>MEETING TITLE:</p> <div style="border: 1px solid black; height: 30px;"></div>		
<p>MEETING DATE: / /</p>	<p>MEETING TIME: _____</p>	
<p>BEFORE THE MEETING:</p> <ul style="list-style-type: none"> <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ 	<p>FOLLOW-UP/TASKS:</p> <ul style="list-style-type: none"> <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ 	<p>MEETING NOTES:</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <div style="border: 1px solid gray; min-height: 200px; margin-top: 10px;"></div>
<p>MEETING NOTES:</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>		
<p>NEXT MEETING DATE: / /</p>		<p>MEETING TIME: _____</p>

08 full page meeting

1 meeting; 1 page with lots of meeting notes space

09 half page meetings

2 meetings; 1 page for shorter meetings

10 full spread meetings

1 meeting; 2 pages for meetings with lots of planning, discussion, and follow up tasks

2024 Planner Files — Reference

Sunday	Monday	Tuesday	Wednesday
	1	2	3
7	8	9	10
14	15	16	17
21	22	23	24
28	29	30	31

PRIORITIES THIS MONTH:

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Thursday	Friday	Saturday
4	5	6
11	12	13
18	19	20
25	26	27

01

JANUARY 2024



“Setting goals is the first step in turning the invisible into the visible.”

— Tony Robbins

11 monthly calendars

monthly view calendars with priority task box and customizable trackers to track work tasks you want to do everyday (like returning phone calls) or personal tasks you want to achieve (like staying hydrated!)

WEEKLY PLANNING

01 | JANUARY 2024

MONDAY1

☐ Start Up Routine

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☐ Shut Down Routine

MORNING

AFTERNOON

EVENING

TUESDAY2

☐ Start Up Routine

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☐ Shut Down Routine

MORNING

AFTERNOON

EVENING

WEDNESDAY3

☐ Start Up Routine

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MORNING

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EVENING

THURSDAY4

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☐ Shut Down Routine

MORNING

AFTERNOON

EVENING

FRIDAY5

☐ Start Up Routine

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☐ Shut Down Routine

MORNING

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NEXT WEEK

12 weekly calendars

your day to day by week. Here, you can add in your tasks and take daily notes.

2024 Planner Files — Reference



MainStreet Leadership: Worksheets, Checklists, and Trackers

Service Request Tracker

Grant Tracker

Financials Reference Worksheets

Annual Accreditation Compliance Digital Dashboard Checklist

Annual Accreditation Compliance Activity Checklist

Project/Activity Worksheet

Event/Campaign Worksheet

Presentation Tracker

Presentation Worksheet

Success Tracker

Testimonials Tracker

Impact/Annual Report Tracker

NMMS Acronym Glossary

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13 worksheet contents

a table of contents view of the leadership-related worksheets, checklists, and trackers

SERVICE REQUEST TRACKER

REQUEST: _____ REQUEST DATE: _____

CONTRACTOR ASSIGNED: _____ START DATE: _____

UPDATES

DATE: _____ NOTE: _____

DATE: _____ NOTE: _____

DATE: _____ NOTE: _____

DATE: _____ NOTE: _____

DATE: _____ NOTE: _____

COMPLETED DATE: _____

OUTCOME: _____

REQUEST: _____ REQUEST DATE: _____

CONTRACTOR ASSIGNED: _____ START DATE: _____

UPDATES

DATE: _____ NOTE: _____

DATE: _____ NOTE: _____

DATE: _____ NOTE: _____

DATE: _____ NOTE: _____

DATE: _____ NOTE: _____

COMPLETED DATE: _____

OUTCOME: _____

REQUEST: _____ REQUEST DATE: _____

CONTRACTOR ASSIGNED: _____ START DATE: _____

UPDATES

DATE: _____ NOTE: _____

DATE: _____ NOTE: _____

DATE: _____ NOTE: _____

DATE: _____ NOTE: _____

DATE: _____ NOTE: _____

COMPLETED DATE: _____

OUTCOME: _____

GRANT TRACKER

GRANT NAME/GRANTOR: _____

PROJECT: _____

APPLICATION DUE: _____ NOTIFICATION OF AWARD DATE: _____

KEY DEADLINES:

DATE: _____ ITEM DUE: _____

DATE: _____ ITEM DUE: _____

DATE: _____ ITEM DUE: _____

DATE: _____ ITEM DUE: _____

DATE: _____ ITEM DUE: _____

ADDED TO MASTER TRACKER?

NOTES: _____

COMPLETION DATE: _____

OUTCOMES: _____

GRANT NAME/GRANTOR: _____

PROJECT: _____

APPLICATION DUE: _____ NOTIFICATION OF AWARD DATE: _____

KEY DEADLINES:

DATE: _____ ITEM DUE: _____

DATE: _____ ITEM DUE: _____

DATE: _____ ITEM DUE: _____

DATE: _____ ITEM DUE: _____

DATE: _____ ITEM DUE: _____

ADDED TO MASTER TRACKER?

NOTES: _____

COMPLETION DATE: _____

OUTCOMES: _____

GRANT NAME/GRANTOR: _____

PROJECT: _____

APPLICATION DUE: _____ NOTIFICATION OF AWARD DATE: _____

KEY DEADLINES:

DATE: _____ ITEM DUE: _____

DATE: _____ ITEM DUE: _____

DATE: _____ ITEM DUE: _____

DATE: _____ ITEM DUE: _____

DATE: _____ ITEM DUE: _____

ADDED TO MASTER TRACKER?

NOTES: _____

COMPLETION DATE: _____

OUTCOMES: _____

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15 grant tracker

track any grants you’re interested in applying for, what’s needed for the application, due dates, and outcomes

FINANCIALS REFERENCE – REVENUE

FINANCIALS MONTH AND/OR YEAR(S): _____

REVENUES	\$\$\$	NOTES
Government:		
City Contracts/Awards		
County Contracts/Awards		
Grants:		
Public Sector Grants <i>(local, state, federal, EIDL, ARPA, etc.)</i>		
Foundation Grants		
Fundraising:		
Board Contributions		
Online <i>(website, social media, crowdfunding)</i>		
Partnership Campaign		
Mail Solicitations		
Fundraising Event <i>(gala, etc.)</i>		
Raffles/Gaming		
Corporate Sponsorships <i>(operations)</i>		
Events:		
Ticket Sales		
Event Sponsorships		
Other Sales/Fees		
Earned Income:		
Fee for Services/Contracts		
Merchandise Sales		
Leases/Rent		
Other Business Income		
Donated Property		
Non-Cash Support:		
In-kind gifts		
NMMS Technical Assistance		
Scholarships/Trainings		
TOTAL REVENUE : _____		

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16 financial reference

a reference sheet of organization financials; either to use before digital input or to have on hand while in the field

2024 Planner Files — Reference

ACCREDITATION COMPLIANCE DIGITAL DASHBOARD CHECKLIST

<input checked="" type="checkbox"/>	COMPLIANCE DOCUMENT	DATE UPLOADED
UPDATED ANNUALLY		
<input type="checkbox"/>	Current Board Roster	/ /
<input type="checkbox"/>	Current Year Board Member Conflict of Interest Disclosures	/ /
<input type="checkbox"/>	Current IRS Form 990 Filing	/ /
<input type="checkbox"/>	Current New Mexico Attorney General Registration	/ /
<input type="checkbox"/>	Current New Mexico Secretary of State Registration	/ /
<input type="checkbox"/>	Current Fiscal Year Operating Budget	/ /
<input type="checkbox"/>	Current Year Work Plan with ETS & CBS	/ /
<input type="checkbox"/>	Current Year NMSC Sub-Licensing Agreement Signed/Submitted	/ /
<input type="checkbox"/>	Signed Biannual LOA/MOU with Local Government & NMMS (every two years)	/ /
<input type="checkbox"/>	Main Street America Accreditation Self-Assessment	/ /
<input type="checkbox"/>	Local Program Annual Performance Report	/ /
<input type="checkbox"/>	Annual Partner Surveys Shared with Partners	/ /
<input type="checkbox"/>	Annual Budget & Salary Survey Completed	/ /
UPDATED AS NEEDED		
<input type="checkbox"/>	Records Retention/Destruction Policy	/ /
<input type="checkbox"/>	Whistleblower Protections Policy	/ /
<input type="checkbox"/>	Fiscal Controls Policy	/ /
<input type="checkbox"/>	Non-Discrimination Policy	/ /
<input type="checkbox"/>	Form 1023 (Original Application for Tax-Exempt Status)	/ /
<input type="checkbox"/>	Original Bylaws	/ /
<input type="checkbox"/>	Amendments to Bylaws	/ /

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17 accreditation checklist

be prepared and keep track of all the things needed for accreditation

PROJECT/ACTIVITY PLAN WORKSHEET

PROJECT: _____

DATE: _____PROJECT FALLS UNDER OUR ETS # _____

PEOPLE TO ENGAGE: _____GOALS: _____

KEY TASKS: ☐ _____ DUE: _____
☐ _____ DUE: _____
☐ _____ DUE: _____
☐ _____ DUE: _____
☐ _____ DUE: _____
☐ _____ DUE: _____
☐ _____ DUE: _____
☐ _____ DUE: _____
☐ _____ DUE: _____

NOTES: _____FINANCIALS: _____

TEAM KUDOS: _____OUTCOMES: _____

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18 project/activity plan

a planning space for any organization project or activity

EVENT/CAMPAIGN WORKSHEET

EVENT: _____

DATE: _____

PEOPLE TO ENGAGE: _____GOALS: _____

KEY TASKS: ☐ _____ DUE: _____
☐ _____ DUE: _____
☐ _____ DUE: _____
☐ _____ DUE: _____
☐ _____ DUE: _____

NOTES: _____FINANCIALS: _____

ASSESSMENT: _____

WHAT WORKED: _____NEEDS REVIEW: _____

EXCLUDE: _____DATE FOR NEXT YEAR: _____

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19 event/campaign worksheet

a planning space for any organization event or campaign; also includes an assessment area to reflect on an event/campaign’s impact

PRESENTATION WORKSHEET

PRESENTATION FOR: _____DATE: _____

TOPIC: _____

DESIRED OUTCOME: _____

OUTLINE:

OPENING – Who we are, what we do

INTRODUCE TOPIC –

POINT 1 –

POINT 2 –

POINT 3 –

POINT 4 –

SUMMARY –CALL TO ACTION, CLOSING –

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20 presentation worksheet

a planning space to prepare for public presentations and speeches

2024 Planner Files — Reference



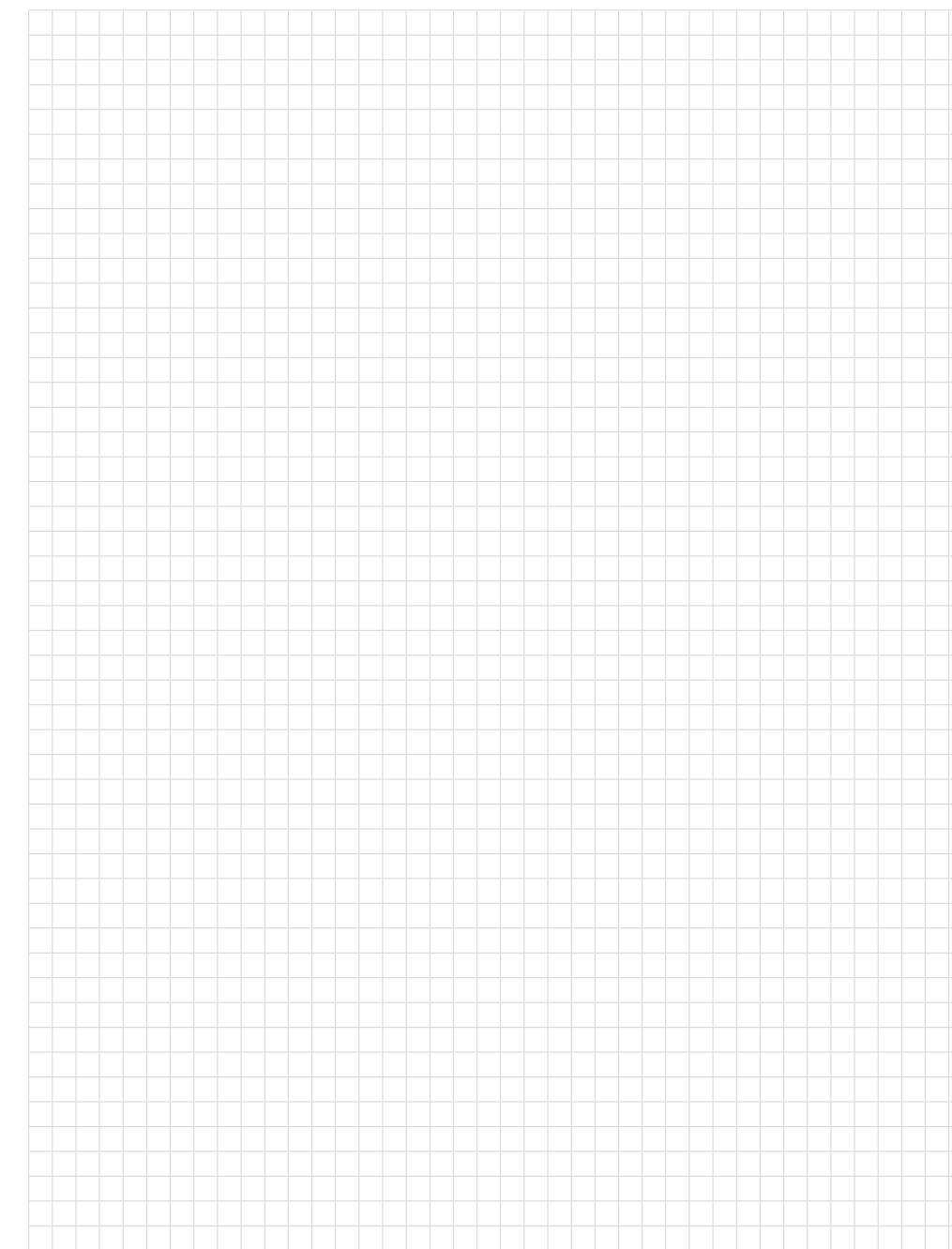
24 blank – lined

a blank page with lined ruling, perfect for long-form notetaking



25 blank – dot grid

a blank page with dot grid ruling; perfect for a mix of notetaking and drawing



26 blank – graph grid

a blank grid with graph ruling; perfect for precise drawing/planning

But I plan digitally!

- Recommended App: GoodNotes
- Files will import as portrait vs. landscape; not the best fit for monthly calendars; pages that are split across the spine.
- Nothing is hyperlinked (but you can add favorites & bookmarks in app to get to the pages you use most frequently)

Ideal Daily Routine

IDEAL WORK DAY/WEEK WORKSHEET

Maximize Productivity

IDEAL WORK DAY/WEEK WORKSHEET

Maximize Productivity

5am	
6am	
7am	
8am	
9am	
10am	
11am	
NOON	
1pm	
2pm	
3pm	
4pm	
5pm	
6pm	
7pm	
8pm	
9pm	
10pm	

[illegible]

DAILY ROUTINES

PERSONAL MORNING ROUTINE	TIME ALLOTTED

WORK START-UP ROUTINE	TIME ALLOTTED

PERSONAL MID-DAY ROUTINE	TIME ALLOTTED

WORK SHUT-DOWN ROUTINE	TIME ALLOTTED

PERSONAL EVENING ROUTINE	TIME ALLOTTED

Ideal Weekly Routine

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
MORNING					
AFTERNOON					
EVENING					

Eisenhower Matrix

The **Eisenhower Matrix** improves productivity by teaching you how to prioritize better. This technique helps you learn which activities are worth your time and effort, and which ones aren't.

	URGENT	NOT URGENT
IMPORTANT	<div><div>DO</div><div>Do it now</div></div> <p>This is crisis management. Reduce the time spent in this quadrant by doing more work in "SCHEDULE" blocks.</p> <div>-----</div> <p>Example:</p> <ul style="list-style-type: none">• <i>Finish a grant due this week.</i>• <i>Prepare for a meeting later today.</i>	<div><div>SCHEDULE</div><div>Schedule a time to do it later</div></div> <p>Work ahead. Spend as much time here as you can. It will require planning and strategic thinking.</p> <div>-----</div> <p>Example:</p> <ul style="list-style-type: none">• <i>Attend a networking event</i>• <i>Put together a civic presentation for next week.</i>• <i>Start on a grant due next month.</i>• <i>Respond to new requests to manage expectations</i>
NOT IMPORTANT	<div><div>DELEGATE</div><div>Who else can do it? Board? Volunteer?</div></div> <p>Empower others!</p> <div>-----</div> <p>Example:</p> <ul style="list-style-type: none">• <i>Transcribe last week's meeting notes</i>• <i>Fold and mail stakeholder updates</i>• <i>Organize files</i>• <i>Take photos for social media</i>• <i>Thank you notes to sponsors and donors</i>	<div><div>LIMIT</div><div>or eliminate</div></div> <p>Limit or eliminate ideas and tasks that do not align with your organizations mission and goals. They may be worthwhile, but not a good choice if they stretch you too thin. Learn to say no!</p> <div>-----</div> <p>Example:</p> <ul style="list-style-type: none">• <i>Sales emails / calls</i>• <i>Request for copies of files on your website</i>• <i>Serve on a planning team for a project outside of the district.</i>

Our Planning Tips

- **Be Flexible!** It may take some time and experimentation to figure out what works best for you. Be willing to assess what is working and what is not working for you and be willing to flex accordingly. You may find yourself combining methods or creating your own and that's totally ok! Make it work for you!
- **Be Consistent!** Effective planning is indeed creating a habit and should be part of your routine to be the most beneficial. Some people like to plan the next day at the end of the day prior while others prefer to with their morning coffee. The choice is up to you!
- **Beginner Tip!** Try not to over-plan your time – You don't want to be checking your planner every 6 minutes to make sure you're on track. Start by writing down your highest priority tasks for each day and any meetings, but don't feel the need to assign something to every minute of the day. Perhaps try blocking them out by morning, afternoon and evening.
- **Admin & Catchup Time** are great additions to your planning arsenal. Things happen and tasks get moved around on the fly, and there are always those admin tasks that constantly get put on the back burner. Schedule in some time (or entire days if possible) to deal with these.
- **Color coding** with pens or highlighters for different categories (Personal/ Work/ Family & Friends) is a great way to quickly get a visual for what your day or week consists of, but keep it broad and stick to only a few categories for optimal productivity.
- **In a hurry?** Use the blank dot grid sections as a place to quickly jot things down when you're in a hurry. Refer back to these sections when doing your daily planning so you don't miss anything! You can also use washi tape or color coded dot stickers to help organize these sections.
- **Abbreviations or codes** for repeated tasks (think email checking, laundry day) take up less room and less time. Creating your own codes/abbreviations/icons can help declutter your planner and make your it your own.
- **Make it Fun for you!** Planning should not be stressful. It should help alleviate day to day stress, knowing everything is in one place. Make it fun – add quotes, color, doodles, stickers, washi tape, photos; the possibilities are endless to make your planner fun!