2025 MainStreet Annual Program Review & Accreditation Process Instructions & Checklist

Hello! If you are reading this, you are preparing for the MainStreet Annual Program Review & Accreditation Process. Huzzah! The annual accreditation process creates a way for Main Street America™ (MSA) programs to measure their progress in implementing the Main Street Approach™ to revitalize their local communities. Achieving Main Street America™ Accredited status requires meeting a series of rigorous standards and is a mark of distinction and a powerful advocacy tool that highlights a program's work and achievements. In New Mexico, Main Street America™ Accredited status is required to be eligible to apply for and receive NMMS Public Infrastructure Capital Outlay funding for construction projects, which can be a substantial infusion of funds for district revitalization.

This document walks through all the elements of the Annual Program Review & Accreditation Process and provides general instructions for each. Throughout the document, the name and email address of the appropriate individual to contact with questions has been provided. If you have questions about items that do not have a specific person identified as the contact, please contact the NMMS Revitalization Specialist assigned to your community: Amy Barnhart (ambconsultingnm@gmail.com; 773.368.7557) or Sasha Pellerin (bugeishaconsulting@gmail.com; 505.322.8898).

The last page of this document is meant to be a **printable checklist** you can utilize to check off progress made on completing the required elements of the annual accreditation process. This checklist is for the personal use of you and your organization. The only item not included is the in-person site visit, as those are scheduled throughout a two-year period by NMMS program leadership and do not necessarily occur during the annual accreditation process.

Annual Program Review & Accreditation Components

1. **Update & Upload:** Compliance Documents to the NMMS Digital Dashboard

2. **Solicit:** Partner Survey Responses via a SurveyMonkey link

3. **Complete & Upload:** MSA Community Evaluation Self-Assessment & Supporting Docs to the MSA Reporting Platform

4. **Complete & Upload:** Local Program Annual Performance Report **OR** Recent Impact Report to the MSA Reporting Platform

5. **Participate:** Annual Program Review & Accreditation Meeting (Virtual) on Zoom

6. **Participate:** In-Person Site Visit

7. **Complete & Upload:** Quarterly Reinvestment Statistic Reports (Salesforce) and Annual Budget & Salary Survey (SurveyMonkey)

1. Update & Upload: Compliance Documents to the NMMS Digital Dashboard

Every year, NMMS asks each local program to upload the current version of their annual compliance documents to the organization's dedicated "Digital Dashboard" which is housed within the NMMS website and requires an invitation and password to access. The dashboard serves as a repository for the local program's annual compliance documents, other organizational and planning documents, and the status of each local program's Executive Director toward achieving "MainStreet Professional Certification." **Compliance documents must be uploaded to the dashboard no later than one (1) week prior to the local MS organization's annual program review and accreditation meeting.**

The following compliance document should be updated and uploaded on an **annual basis in advance of the Annual Program Review & Accreditation Process**:

- Current **Annual Work Plan**, demonstrating alignment with Economic Transformation Strategies

- Current **Operating Budget**

- Current **Board Roster**

- **Board Conflict of Interest Disclosures** reflecting current board roster

- **IRS Form 990**, most recently closed fiscal year or copy of extension request

- Current **NM Secretary of State Registration**

- Current **NM Attorney General Registration**

- *Signed* Biannual **LOA/MOU with Local Government**, including City Council/ County Commission Resolution of Support (MOUs approved in 2024 good through end of June 30, 2026)

- Current **Local Government Service Contract** (Signed)

- Current **NMSC Sub-Licensing Agreement** (Signed)

The following compliance documents should be uploaded "one time" and then uploaded again if/when changes are made to them and approved by the Board:

- IRS Form 1023

- Bylaws/Amendments

- Conflict of Interest Policy

- Records Retention/Destruction Policy

- Whistle Blower Protection Policy

- Fiscal Controls/Financial Management Policy

- Non-Discrimination Policy

Digital Dashboard: Where Compliance Documents Live

NMMS Compliance Elements
The following items are required of all local MainStreet programs t... MainStreet and National Main Street Center guidelines. Please upl... year in the appropriate areas. Please note that only one file can be... please scan all signed disclosure statements into one file prior to u...

FULLY ACHIEVED

Executive Director Training and Certification
This section monitors progress toward completion of basic trainin... for all Executive Directors. Executive Director State Certification is... program staff must apply to enroll in the program. To maintain Sta... basic training requirements and meet all annual attendance requir... Certification carries the benefits of peer recognition, bonus points... applications, and other funding supports. ED Training & State Cert...

FULLY ACHIEVED

Main Street America Accreditation
The following section addresses the Ten Standards of Performance... Inc. for Accreditation of local MainStreet programs. Accreditation... programs in order to access all benefits provided through NMMS. F... will result in classification as a Main Street America Affiliate progra...

AFFILIATE

Document Repository
The following items represent an effort by NMMS to create a repos... reports, etc. for each local MainStreet program. Not all of the item... community or organization.

If you do not have access to the dashboard, please let NMMS (Amy Barnhart/Sasha Pellerin) know and you will receive an email invite to sign in. Use the temporary password assigned in the email to login with your email account. Once you login, you can change your password via the "change password" link at the top right-hand side of the webpage.

To return to the dashboard, go to www.nmmainstreet.org and scroll to the bottom of the home page and click on the "Member Dashboard" link on the right-hand side of the screen. You will then be prompted to enter your user ID and password.

There are **four sections** in each local program's dashboard:

- **NMMS Compliance Elements**
  - You will upload annual and "one time" compliance documents to this section.

- **Main Street America™ Accreditation**
  - You are **NOT REQUIRED** to upload anything to this section, as the MSA Reporting Platform (www.mainstreetreporting.org) will be used for completing the Main Street America™ Community Evaluation Self-Assessment and will also be the place in which you upload the Local Program Annual Performance Report (or recent Impact Report). NMMS will upload a copy of your organization's Annual Program Review & Accreditation Report, which contains recommendations for the following year, to this section of the NMMS Digital Dashboard.

- **Executive Director Certification**
  - NMMS tracks each local program's Executive Director's progress toward completing required NMMS trainings and achieving Certification here. If the information is incorrect, please email Jessica Mraz (Jessica.Mraz@edd.nm.gov) with the information that should be updated.

- **Document Repository**
  - Your organization can upload a variety of documents here, including planning documents, reports, and your organizational logo. The document repository enables NMMS as well as the local organization to access these documents when needed.

The first three sections of the dashboard feature red, yellow, and green lights that light up depending on whether the organization has fully achieved (green), partially achieved (yellow) or not achieved (red) that section. Please note, the lights do not change when you upload documents; they only change after NMMS confirms that the uploaded documents are correct and checks off a box indicating that the document line item has been "achieved."

Please inform NMMS (Amy Barnhart/Sasha Pellerin) when you have uploaded a significant number of compliance documents that should be reviewed and checked off as achieved. It is also helpful if you

provide an email update on any missing compliance documents, so NMMS knows when to expect them to be completed and uploaded. <u>Only NMMS can edit or add to the comments listed next to each line item.</u> When you provide updates on missing documents, NMMS will add that information there.

NMMS Compliance Elements

The following items are required of all local MainStreet programs to ensure compliance with New Mexico MainStreet and National Main Street Center guidelines. Please upload documents for the current calendar year in the appropriate areas. Please note that only one file can be uploaded per section. For items #3, please scan all signed disclosure statements into one file prior to upload.

PARTIALLY ACHIEVED

Gauge Calculation: "Not Achieved" - less than 60%; "Partially Achieved" - equal to or greater than 60% but less than 90%; "Fully Achieved" - 90% or more

Line item	Field	Comment	File	Achieved?
1	Current Year Board Roster, w/ contact information	To be updated for 2022	36-Board of Director Roster 07-13-2021.xls Last modified: August 20, 2021	No
2	Current Year Board Member Conflict of Interest Disclosure Statements - SIGNED	To be updated to reflect 2022 board roster, if needed	36-2021 Conflict of Interest Disclosure Statements .pdf Last modified: September 21, 2021	No
3	Current IRS Form 990 Filing	To be updated for 2022	36-2019 Exempt organization Return.pdf Last modified: September 15, 2021	No
4	Current NM Secretary of State Registration	In good standing until 11.15.22		Yes
5	Current NM Attorney General Office Registration	In good standing thu end of 2022		Yes

2. Solicit: Partner Survey Responses via SurveyMonkey

The Annual Program Review & Accreditation Process includes a very brief online survey for partners of your organization; it should take no more than 5-10 minutes to complete. <u>The survey link for your organization will be shared with your organization via email</u> and should be shared by your program with municipal leaders (Mayor, city/county

Q3 To the best of your knowledge, please rate the effectiveness of the MainStreet program in regard to the following indicators:

Answered: 15   Skipped: 0

	NOT EFFECTIVE	SOMEWHAT EFFECTIVE	EFFECTIVE	VERY EFFECTIVE	TOTAL
How effective is the local MainStreet program in supporting the OVERALL REVITALIZATION of the MainStreet district?	0.00% 0	0.00% 0	33.33% 5	66.67% 10	15
How effective is the local MainStreet program in regards to forging a POSITIVE ECONOMIC IMPACT in the MainStreet district?	0.00% 0	0.00% 0	26.67% 4	73.33% 11	15
How effective is the local MainStreet program in implementing PHYSICAL IMPROVEMENTS, such as rehabilitating buildings and property, the District's streetscape, and/or other beautification or construction projects?	0.00% 0	6.67% 1	20.00% 3	73.33% 11	15

commissioners, city/county administrators and managers), community partners (other non-profits you work with, EDC, CDC, or Chamber of Commerce leaders), district business/property owners, any volunteers that <u>ARE NOT</u> part of your Board, and stakeholders. The community partner survey is an important tool to hear feedback from people OUTSIDE your organization and helps you meet the "community input" criteria established by Main Street America as contributing to being a high-performing Main Street program. **Please recruit at least 8-10 partners (though more is certainly encouraged!) to complete the survey no later than one (1) week prior to the accreditation meeting.**

NMMS recommends you <u>send the survey link out multiple times to ensure the highest number of responses</u> – when you initially receive it, and again one to two more times prior to the meeting, keeping in mind that the responses will be downloaded by NMMS one week prior to the accreditation meeting. You are not able to check how many survey responses you have, so ask NMMS (Amy Barnhart/Sasha Pellerin) if you would like to know how many responses you have received.

3. Complete & Upload: MSA Community Evaluation Self-Assessment & Supporting Documents to the MSA Reporting Platform

HOW GRADING WORKS

Within each Standard in the new Self-Assessment Tool, score yourself on the Indicators listed based on a scale of 1-5. Each number represents the following:

1	2	3	4	5
Not being addressed.	Minimal work but needs more effort.	Evidence of satisfactory progress.	Has achieved success within this indicator	Outstanding achievement. One that other programs could replicate.

All MainStreet programs **must complete the Main Street America™ Community Evaluation Self-Assessment within the MSA Reporting Platform (www.mainstreetreporting.org)**. Use the Self-Assessment tool to rate how well your organization is meeting the Indicators for each Standard and record the ratings (scale of 1 to 5) – along with justifications for the ratings – for each Indicator in the online platform. The preferred approach for rating your organization is to **gather input from both Board and Staff**. Some organizations have asked Board and Staff to complete the Self-Assessment individually, averaged the ratings, and then engaged in discussion to finalize the ratings for each Indicator.

Provide justifications for the ratings your organization gives itself in the "Notes" section of each Standard. You can either provide specific examples of how you are achieving each Indicator or you can list projects that are included in your Performance Report (or recent Impact Report). It can be helpful to complete the Self-Assessment before completing the Performance Report, to ensure your organization captures all the projects and activities that support and justify your ratings. **Please note, the MSA Reporting Platform requires you to enter supporting justifications into the "Notes" section before the platform will save your ratings and allow you to complete the Self-Assessment.**

NMMS is also required to rate each organization against the Standards to determine Affiliate or Accredited status, and when the organization does not provide sufficient justifications, it makes it very challenging for NMMS to provide its own rating. If NMMS is unable to provide its own ratings **due to a lack of information**, the local MainStreet program will be **designated an Affiliate program, limiting access to NMMS Public Infrastructure Capital Outlay**.

Local Program

Score | Scoring Scale
Choose...

Notes

In addition to the self-assessment, **MSA also requires that each program upload a Board Roster (with Board Composition), an Organization Budget, and a detailed Work Plan that demonstrates alignment with your Transformation Strategies.** NMMS recommends that you utilize a NMMS or MSA template for these documents, which can be found on the NMMS website here. NMMS also recommends that you upload the **same** document to the NMMS Digital Dashboard as well, to avoid duplicating your efforts.

In addition to the above-mentioned documents, MSA also requests that you upload an "**Annual Report, Info-graphic, press release or other documentation to explain the progress of your program**." If your organization **does not** have an annual impact report or a similar document, NMMS recommends that you **upload your Local Program Annual Performance Report to demonstrate your progress**. Please note, you will be asked to upload it again later in the MSA Reporting Platform as well.

NMMS has added three additional "questions" to the MSA Reporting Platform. They are as follows:

1. NMMS requires your program to <u>upload either its Local Program Annual Performance Report or a recent Impact Report</u> to this platform.
2. NMMS asks that you identify any <u>future projects that may require NMMS technical assistance in the coming year</u>.
3. NMMS asks that you identify any <u>weaknesses that came up during the Self-Assessment</u> that your organization intends to address in the coming year.

Historically, the Local Program Annual Performance Report contained questions #2 and #3 above and the report was uploaded directly to the NMMS Digital Dashboard. This year, these two questions will be built into the MSA Reporting Platform and will therefore NOT need to be answered in the Performance Report.

The **MSA Community Evaluation Self-Assessment** must be completed and **supporting documents** <u>uploaded to the MSA Reporting Platform</u>, **at least one (1) week prior to the accreditation meeting**.

4. Complete & Upload: Local Program Annual Performance Report OR Recent Impact Report

The **Local Program Annual Performance Report** template provides a space for your organization to **report on the accomplishments and successes of your organization over the previous 12 months**. Provide enough project details and measurements/data (when possible) so that a person unfamiliar with the project understands what the project

ETS #1 ☐	ETS#2 ☐	CBS ☒	OTHER ☐
STANDARD(S) OF PERFORMANCE:	Standard 1: Broad-based Community Commitment to Revitalization		
PROJECT TITLE:		**PROJECT COMPLETION STATUS:**	
Enhance coordination and communication with the Municipality		Ongoing; initiated January 2024	
PROJECT DESCRIPTION/ OUTPUTS/ OUTCOMES:			

- During the 2023 NMMS Annual Accreditation process, City officials stated that while they were supportive of SMS, they were not aware of all the organization's accomplishments. Similarly, SMS board and staff stated that they were not always aware of City redevelopment projects that were impacting the district until they were on the verge of implementation. Both the City and SMS wanted to improve their communication.
- SMS presented quarterly updates on the organization's ongoing work and accomplishments at City Council meetings, two (2) presentations at the time of this report. We met monthly with the City Administrator to review ongoing SMS and City projects that might intersect or require buy-in and input, eight (8) meetings at the time of this report.
- Via informal survey at the June 2024 City Council meeting, locally elected officials stated that they have a greater awareness of the activities and accomplishments of SMS. *(Knowledge)*
- The City Administrator has stated that she now understands which City projects require input/buy-in from SMS. After meeting twice with the City Administrator, the SMS Executive Director was included on emails and invited to attend City committee meetings on projects that impact the district, including new sidewalks in the district and development of a vacant piece of land located on the edge of the district, resulting in a sidewalk construction mitigation plan for the district businesses and a community-supported plan for the development of the lot. The continued meetings ensure that the City and SMS remain on the same page on existing projects, collaborate on future projects, and identify and leverage all possible resources. *(Knowledge, Behavior)*

entailed and what the impacts were. <u>Please look at the Local Program Annual Performance Report Instructions & Sample Report for examples of well-written project reports</u>. In addition to reporting on your organization's accomplishments and successes, you should also indicate how each <u>project supports one or more of the MSA Six Standards of Performance</u>.

<u>If your organization has **completed an Impact Report in the six months prior to its annual program review and accreditation meeting**, this document may be **substituted for the Local Program Annual Performance Report**</u>. Impact Report refers to a fully branded, formatted, and print-ready report designed by the NMMS Revitalization Specialists in Graphic Design & Marketing that communicates your program's impact to your local government, stakeholders, and community members.

If your organization has completed an "Impact Report Submission Form" but it has not yet been designed and formatted into a report, you can submit the submission form in place of the Local Program Annual Performance Report, as long as it is complete. You can find the Impact Report Submission Form [here](#) along with other information about developing an Impact Report.

The **Local Program Annual Performance Report** or recent **Impact Report** <u>must be uploaded to the **MSA Reporting Platform**</u>, **at least one (1) week prior to the accreditation meeting**.

5. **Participate:** Annual Program Review & Accreditation Meeting (Virtual)

Main Street America™ requires that each state coordinating program conduct an annual program review meeting as a part of the annual accreditation process. In recent years, NMMS has transitioned this meeting from an in-person meeting to a **one-hour virtual meeting, in which NMMS program leadership meet with the local MainStreet program Board and Staff as well as representatives of the local municipal government partner** (*Mayor, Councilors, Commissioners and Administrators).* **At least 80% of the local program's Board members should attend this meeting.**

The meeting discussion will focus on <u>future goals, priorities, and needs of the local MainStreet organization/community, and how NMMS can assist with resource identification, technical assistance, and project implementation over the next 12 months</u>. If there are any specific topics the local organization would like the NMMS team to address during the meeting (or challenges that need troubleshooting), please let NMMS know in advance (Amy Barnhart/Sasha Pellerin). <u>The meeting link will be shared directly with your organization via email.</u>

6. **Participate:** In-Person Site Visit

Main Street America requires that each state coordinating program visit each local MainStreet program at least once every two years. Generally, this requirement is met when NMMS program leadership or Revitalization Specialists visit your community to participate in a meeting or provide technical assistance to your local MainStreet program. If you have not been visited by NMMS Staff or Revitalization Specialist in the previous two years, please reach out to NMMS leadership to identify an opportunity (Daniel Gutierrez, daniel.gutierrez2@edd.nm.gov; Lucas Pedraza, lucas.pedraza@edd.nm.gov).

7. **Complete & Upload:** Quarterly Reinvestment Statistic Reports and the Annual Budget & Salary Survey

Quarterly Reinvestment Statistic Reports

Reinvestment statistics are a way to measure changes over time in the district and the economic impact being made by the organization on the district. <u>Each MainStreet program is expected to collect reinvestment statistics for their district and submit them via reports submitted quarterly to NMMS on required deadlines (October 1st; January 1st; April 1st; and July 1st).</u> Those statistics are then reported to the NM State Legislature and Main Street America.

While these reports are submitted throughout the year, and not necessarily at the same time as the accreditation process, **failure to submit these reports can impact the Accredited status of the MainStreet program**. Programs that fail to submit their reports will be designated as Main Street America Affiliate programs, which would <u>prevent the organization from accessing NMMS Public Infrastructure Capital Outlay Funds for project construction</u>.

The reports are submitted via Salesforce and NMMS provides each organization with log in information. For questions about these reports, please contact NMMS (Lucas Pedraza; lucas.pedraza@edd.nm.gov).

Annual Budget & Salary Survey

Each Main Street program is required to respond to the Annual Budget & Salary Survey, which is typically completed in November or early December of each year. The information is then forwarded to Main Street America as part of the annual accreditation process. The consolidated data is made available to all Main Street programs in New Mexico and can serve as a useful barometer for comparing your MainStreet program with other programs throughout the state, for things such as municipal service contract funding levels, staff salaries and benefits, and annual fundraising success.

* 11. Staff benefits provided by the Organization:	Executive Director	Assistant Director	Admin. Assistant	Promotion/Event/Project Coordinator	Other staff
NONE	☐	☐	☐	☐	☐
Paid Vacation	☐	☐	☐	☐	☐
Paid Sick Leave	☐	☐	☐	☐	☐
Other Paid Leave	☐	☐	☐	☐	☐
Health Insurance	☐	☐	☐	☐	☐
Other Insurance Plan (Dental, Life, Disability, etc)	☐	☐	☐	☐	☐
Retirement Plan	☐	☐	☐	☐	☐
Paid Overtime	☐	☐	☐	☐	☐
Compensation Time	☐	☐	☐	☐	☐
Car/Mileage Allowance	☐	☐	☐	☐	☐
Cell Phone Reimbursement	☐	☐	☐	☐	☐
Paid Training (other than NMMS trainings)	☐	☐	☐	☐	☐

The survey link is emailed to local MainStreet programs in November/December. For questions about the survey, contact NMMS (Amy Barnhart).

You Made It!

Thank you for reading though the Annual Program Review & Accreditation Process instructions! By doing so, you have set your organization – and NMMS – up for a smoother and more effective accreditation process. On the following pages, you will find a checklist for tasks to be completed to be successful in the Annual Program Review & Accreditation Process. This checklist is for you and your own personal use as you prepare for this important process.

If you have any questions about this process, please contact NMMS (Amy Barnhart/Sasha Pellerin).

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2025 MainStreet Annual Review & Accreditation Process Checklist

Update & Upload: Compliance Documents to the NMMS Digital Dashboard	Date Uploaded	Comments
Current Annual Work Plan, demonstrating alignment with Economic Transformation Strategies		
Current Operating Budget		
Current Board Roster		
Current Board Conflict of Interest Disclosures		
IRS Form 990		
Current NM Secretary of State Registration		
Current NM Attorney General Registration		
Current LOA/MOU with Local Government (Signed; Biannual MOUs executed in 2024 good thu end of FY2026)		
Current Local Government Contract (Signed; annual)		
Current NMSC Sub-Licensing Agreement (Signed)		

Solicit: 8+ Partner Survey Responses via SurveyMonkey	Date Emailed	Comments
Email Survey Link to Partners - First Time		
Email Survey Link to Partners - Second Time		
Email Survey Link to Partners - Third Time		

Complete & Upload: MSA Community Evaluation Self-Assessment & Supporting Docs to the MSA Reporting Platform	Date Completed/ Uploaded	Comments
Log into www.mainstreetreporting.org to review online reporting platform for self-assessment		
Solicit self-assessment ratings feedback from Board & Staff		
Finalize self-assessment ratings and justifications		
Enter self-assessment ratings and justifications into online reporting platform		
Upload supporting docs to online reporting platform (Board Roster/Matrix, Budget, Work Plan with ETS, Annual Report)		

Complete & Upload: Local Program Annual Performance Report to the MSA Reporting Platform	Date Uploaded	Comments
Upload performance report or recent Impact Report		

Participate: Annual Program Review & Accreditation Meeting (Virtual) on Zoom	Date Emailed	Comments
Send meeting notification to Board and Municipal Partners		
Send meeting reminder to participants - First Time		
Send meeting reminder to participants - Second Time		

Complete & Upload: Quarterly Reinvestment Statistic Reports to Salesforce	Date Submitted	Comments
First Quarter Report (Due October 1, 2024)		
Second Quarter Report (Due January 1, 2025)		
Third Quarter Report (Due April 1, 2025)		
Fourth Quarter Report (Due July 1, 2025)		

Complete: Annual Budget & Salary Survey via SurveyMonkey	Date Submitted	Comments
Submit survey (November/December 2025)		