



HERITAGE
OHIO

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2011 Year-End Program Evaluation Report

Heritage Ohio Main Street Program

Introduction

The purpose of the annual Heritage Ohio Main Street Program year-end assessment visit is to recognize program accomplishments made in 2011, to address and discuss additional downtown revitalization issues, and to eliminate barriers to achieving your work plan goals and activities. This assessment is not meant to be a qualitative ranking to compare your community's 2011 downtown revitalization and management activities with other programs, and no official "report card" will be issued. Main Street communities vary considerably in their downtown revitalization priorities, financial and volunteer resources, and the scope and types of downtown revitalization activities the Main Street program decides to undertake; therefore, comparison between communities is impossible. Instead, the evaluation examines the effectiveness of the local Main Street program within its own context and circumstances, and recommends a level of activity the organization and community is prepared to undertake in the coming year appropriate to your overall goals and objectives.

During this year-end assessment visit, information will be collected from several sources, including input from municipal partners, and on-site interviews with the board and committee members and staff. This information will be integrated into recommendations organized within the context of the Ten National Main Street Community Criteria. The National Main Street Community Criteria certification program is intended to promote national standards of performance for established Main Street organizations, and annual accreditation for programs meeting the standards. These standards, developed by the National Trust Main Street Center (NTMSC), in cooperation with state, city and countywide Main Street coordinating programs, provide benchmarks and guidelines on how a Main Street revitalization program should optimally function, and serve as an incentive for programs to operate more effectively. Your compliance of the Memorandum of Agreement with Heritage Ohio is also monitored during the evaluation process.

National Main Street Program Accreditation Criteria

1. Broad-based community support
2. Vision and mission statements
3. Comprehensive work plan
4. Historic preservation ethic
5. Active board and committees
6. Adequate operating budget
7. Paid professional staff
8. Program of ongoing training
9. Reporting of key statistics
10. Main Street Network membership

In order for a local program to be designated as an Accredited Heritage Ohio Main Street Program, the organization must meet eligibility requirements and receive a score of at least 7 points on each of the 10 criteria.

Total number of accreditation criteria receiving 7 or more points: _____

Your community's Main Street Program **IS / IS NOT** accredited for 2011.

Signature of Evaluator

Date

1. Broad-based Community Support

At its best, a local Main Street program represents and involves a coalition of organizations, agencies, businesses, and individuals from throughout the community — not just those who own property or businesses in the commercial district or who have a direct economic tie to it, but all members of the community who are interested in the community's overall health. Involvement by both the public and private sectors is critical as well; neither sector can revitalize the commercial district without the skills and vantage points of the other. Ideally, both sectors will participate in the revitalization process by providing funding, leadership, and ideas, and by encouraging collaboration between existing programs to assist the revitalization process. By actively involving a broad range of interests and perspectives in the revitalization process, the Main Street program leverages the community's collective skills and resources to maximum advantage. The overall goal is for a broad range of constituencies from both sectors to understand and be philosophically committed to the revitalization process and, to that end, to commit the maximum resources possible to achieve the goal of revitalizing the commercial district.

Indicators-

- Board representation comes from at least 7 of the following entities: chamber, CVB, city, county, preservation organization, district property owner, district business owner, resident, large employer, other community institution/organization (1 point) _____
- Organization recruited 10 new volunteers during 2011 (1 point) _____
- Staff spends 20% of their hours per week visiting with downtown district stakeholders (1 point) _____
- Organization actively works to recruit new members and retain existing members (1 point) _____
- Public support comprises at least 10% but less than 50% of 2011 budget revenue (1 point) _____
- Organization partnered with at least two other organizations in 2011 (1 point) _____
- Met with a majority of city/village council members outside of regularly scheduled council meetings (1 point) _____
- Met with county commissioner/state rep/senator (1 point) _____
- Organization can demonstrate a strong relationship with top city official (mayor, city manager, council president) (1 point) _____
- Organization maintains an active public relations campaign that includes tools such as a newsletter, updated website, facebook page, twitter account, press releases, annual meeting, annual report (1 point) _____

TOTAL _____

2. Vision and Mission Statement

A mission statement communicates the organization's sense of purpose and overall direction. A vision statement communicates and describes the look and feel of the district when the mission has been accomplished. The mission statement can state the method to achieve the community's vision for their downtown.

Be mindful that neither is simply a slogan. Both should be developed with the participation of the board, committees, program volunteers, and the community.

Indicators-

- Current and clear mission statement (2 points) _____
- Current and clear vision statement (2 points) _____
- All board members are familiar with the mission statement (2 points) _____
- Organization has reviewed the mission and/or vision in 2011 (2 points) _____
- Organization actively promotes the mission and/or vision to the public using tools such as its website, business cards, t-shirts, press releases, banners, etc (2 points) _____

TOTAL _____

3. Comprehensive Work Plan

A comprehensive annual work plan provides a detailed blueprint for the organization’s activities; reinforces the program’s accountability both within the organization and in the broader community; and provides measurable objectives by which the program can track its progress. Tasks with names of people assigned to those tasks are important.

Indicators-

- Strategic plan/annual work plan document was completed within the previous year (2 points) _____
 - Business Enhancement Committee work plan includes multiple projects, measurable goals, multiple volunteers, specific tasks, completion dates, and budget/costs, with regular updates to the board (2 points) _____
 - Design Committee work plan includes multiple projects, measurable goals, multiple volunteers, specific tasks, completion dates, and budget/costs, with regular updates to the board (2 points) _____
 - Operations Committee work plan includes multiple projects, measurable goals, multiple volunteers, specific tasks, completion dates, and budget/costs, with regular updates to the board (2 points) _____
 - Marketing Committee work plan includes multiple projects, measurable goals, multiple volunteers, specific tasks, completion dates, and budget/costs, with regular updates to the board (2 points) _____
- TOTAL** _____

4. Historic Preservation Ethic

Historic preservation is central to a Main Street program’s purpose. The historic buildings and public spaces of a traditional commercial district enrich civic life and add value on many levels to the community. Developing a historic preservation ethic is an ongoing process of education and discovery for a community and for a local Main Street program. Main Street programs that have embraced a strong historic preservation ethic are successful in saving, rehabilitating, and finding new uses for traditional commercial buildings and in intensifying the uses of the district’s buildings, through both specific building improvement projects and through policy and regulatory changes, which make it easier to develop property within the commercial district.

Some Main Street programs purport to support preservation values, but do not fully understand that preservation is an ethic, not just an activity or group of activities. Historic preservation involves not only the process of rehabilitating, restoring, or renovating older commercial buildings but also the process of adopting planning and land use policies that encourage full use of existing commercial centers before new development takes place, removing the regulatory and other barriers, which sometimes make it difficult to attract investment to historic commercial districts.

Indicators-

- City/village maintains an active design review board that includes a downtown district (1 point) _____
- Downtown district listed in the National Register of Historic Places (1 point) _____
- Organization completed a preservation project (1 point) _____
- Local funding is in place to assist with building improvements (1 point) _____
- Organization assisted property owners with design assistance (1 point) _____
- Community is a Certified Local Government (1 point) _____
- Municipality has a code enforcement strategy in place (1 point) _____
- Main Street organization representative attended a preservation training/workshop in 2011 (1 point) _____
- No historically significant buildings were demolished in 2011. If a building was lost, demonstrate how the organization mounted a campaign to stop the demolition (1 point) _____
- A downtown building was appropriately renovated in 2011 (1 point) _____

TOTAL _____

5. Active Board & Committees

Main Street revitalization is an ongoing process of changing a community's attitudes about its traditional commercial district(s). The direct involvement of an active board of directors and active committees is key to this process. The Main Street director is responsible for facilitating the work of volunteers, not for single-handedly revitalizing the commercial district. In some cases, local Main Street programs have been launched by or have merged with other organizations, which have a broader agenda (such as a chamber of commerce or a community development corporation). A local Main Street program in one of these circumstances has a better chance of long-term success if it maintains focus on its particular purpose and if its mission statement, work plan, budget, and governing body remain distinct from that of the larger organization in which it is contained. A full board that meets regularly, as stated in its by-laws, is extremely important.

Indicators-

- Board is active in fundraising for the organization (1 point) _____
 - Organization achieved 100% board giving in 2011 (1 point) _____
 - Board met regularly (monthly, bi-monthly) and had a quorum for at least 80% of meetings (1 point) _____
 - Each board member also serves as either an officer or committee member (1 point) _____
 - Organization has by-laws document, board member commitment letter, board member job description, and formal board member orientation (1 point) _____
 - Organization has Directors and Officers insurance (1 point) _____
 - Business Enhancement Committee – majority of committee attended at least 75% of scheduled meetings, completed at least two projects, and has an active committee chair (1 point) _____
 - Design Committee – majority of committee attended at least 75% of scheduled meetings, completed at least two projects, and has an active committee chair (1 point) _____
 - Operations Committee – majority of committee attended at least 75% of scheduled meetings, completed at least two projects, and has an active committee chair (1 point) _____
 - Marketing Committee – majority of committee attended at least 75% of scheduled meetings, completed at least two projects, and has an active committee chair (1 point) _____
- TOTAL** _____

6. Adequate Operating Budget

In order to be successful, a local Main Street program must have the financial resources necessary to carry out its annual program of work. The size of a program's budget will change as the program matures (in its early years, it may need less money than in its growth years). In addition, program budgets are likely to vary according to regional economic differences and community size.

Indicators-

- Cities: Main Street organization has an annual budget of at least \$65,000
Villages: Main Street organization has an annual budget of at least \$35,000 (1 point) _____
- Funding is derived from at least 5 of the following sources: Membership, earned income, sponsorship, municipal support, county support, bed tax, charitable contributions, and other community organizations (1 point) _____
- Not more than 50% of the budget is derived from a single source (public support, stakeholder support, earned income) (1 point) _____
- Earned income comprises at least 25% of 2011 budget revenue (1 point) _____
- Stakeholder support (membership) comprises at least 25% of 2011 budget revenue (1 point) _____
- Budget includes travel expenses to attend the Heritage Ohio annual conference, the revitalization training series, and National Main Streets Conference (1 point) _____
- Organization had at least 3 months of operating reserves at the end of 2011 (1 point) _____
- Board has adopted a comprehensive Financial Policies/Procedures document (1 point) _____
- Organization has an active treasurer who makes regular monthly financial reports to the board (1 point) _____
- Organization has an annual audit or review (1 point) _____

TOTAL _____

7. Staff Management & Development

Coordinating a successful Main Street program requires a trained, professional staff person whose sole job focus is the downtown. Main Street Managers come from a broad range of academic and professional backgrounds. The most successful Main Street Managers are those who are good communicators, can motivate volunteers, and have good project management skills, keeping revitalization activities moving forward on schedule and on budget. **The Main Street Manager's position is full-time (generally 40+ hours per week). In communities with population under 5,000, a part-time director is usually acceptable (generally 25+ hours per week).**

Date of Hire for Main Street/Organization Director: _____

Date of 2011 employee evaluation: _____

Indicators-

- Staff employed full-time (part-time in communities with population under 5,000) (4 points) _____
 - Executive staff was in place for at least 10 months during 2011 (1 point) _____
 - Executive staff made regular monthly reports to the board (1 point) _____
 - Executive staff received a formal written evaluation during 2011, during which performance expectations & compensation package of staff were reviewed/revised (2 points) _____
 - Organization provided staff with professional development opportunities in 2011 (1 point) _____
 - Executive staff answers to and has only 1 boss, typically the board chair (1 point) _____
- TOTAL** _____

8. Program of Ongoing Training

In order to meet new challenges and ensure a strong organization, Main Street program participants need ongoing training. Participants—both staff and volunteers—need different skills in different phases of the revitalization process. For that reason, the skills a program's participants learn in the program's catalyst phase are rarely adequate for the growth or management phases. As staff and volunteer turnover occurs, new staff members and new volunteers will need basic Main Street training. Moreover, all program participants should stay current on issues that affect traditional commercial districts and on new revitalization techniques and models. Regular attendance at Revitalization Series trainings and networkings is required for Main Street executive staff. **Staff and volunteer attendance at training opportunities such as the Heritage Ohio Annual Conference and the National Main Street Conference is strongly recommended.**

Indicators-

- Staff attended at least 3 Main Street quarterly trainings and at least 3 Main Street quarterly networkings (4 points) _____
 - Organization representative (staff and/or volunteer) attended a full day of Heritage Ohio's annual conference and/or attended the National Main Street Conference (2 points) _____
 - At least 2 volunteers (board members, committee members) attended Main Street 101 (1 point) _____
 - Volunteer attended a revitalization training (1 point) _____
 - Organization representative (staff and/or volunteer) attended other training/workshop put on by a regional planning commission, Ohio Historic Preservation Office, Urban Land Institute, etc, that was relevant to downtown revitalization (1 point) _____
 - Organization has an orientation process in place to acclimate new volunteers for working within a Main Street context (1 point) _____
- TOTAL** _____

9. Reporting of Key Statistics

Tracking statistics—reinvestment, job and business creation, etc—provides a tangible measurement of the local Main Street program’s progress and is crucial to garnering financial and programmatic support for the revitalization effort. **Statistics must be collected on a regular, ongoing basis, and shared whenever appropriate.**

Indicators-

- Organization submitted 2011 quarterly reinvestment reports no later than 15 days after the end of each calendar quarter (4 points) _____
 - Organization creates/distributes an annual report promoting work plan accomplishments and reinvestment statistics (2 points) _____
 - Staff regularly communicates with Heritage Ohio outside of trainings and networking meetings (1 point) _____
 - Staff is using the Ohio Main Street and/or National Main Street list serve as a tool to improve your district (1 point) _____
 - Staff actively participates at the Main Street networking meetings (1 point) _____
 - Organization holds an annual meeting to raise public awareness about and promote its impact on revitalization (1 point) _____
- TOTAL** _____

10. Main Street Network Membership

Participation in the National Trust Main Street Network membership program connects local programs to their counterparts throughout the nation, providing them with valuable information and resources.

Indicators-

- Organization is a current Main Street Network member (10 points) _____
- TOTAL** _____

Total number of accreditation criteria receiving 7 or more points: _____

Organizations scoring at least 7 points on all 10 criteria will receive accreditation.

A. Attachments

Please include the following attachments in paper -or- electronic form to assist us in providing the most accurate evaluation of your program possible.

Attachments-

- Board roster
- Committee rosters
- Committee attendance numbers for 2011 (percentage of committee members attending 2011 meetings)
- Mission statement and vision statement
- Annual work plan for each committee (include board and/or staff work plans if your organization completes these)
- Long-range strategic plan
- 2011 budget showing revenue/expense
- Balance sheet preferably showing assets, liabilities, and equity as of December 31, 2011

B. Value for your Annual Dues

Occasionally we're asked about the services a program receives in exchange for their annual \$3,300 Main Street dues. Given that this expense can represent a significant portion of a program's budget, explaining the benefits and services provided during the annual evaluation represents the perfect opportunity to review this information so you can be assured you're making a smart investment.

Benefits/Services	Cost	MS Program Cost
• Revitalization Series Trainings (4/yr)	\$300	\$60
• Revitalization Series Networkings (4/yr)	\$200	\$60
• Annual Conference (buy 1 get 1 free)	\$400	\$200
• Main Street Conference Registration	\$350	\$0
• Annual Evaluation	\$500	\$0
• Executive Director Orientation	\$250	\$0
• Unlimited email/phone consultations	\$500	\$0
• On-Site Technical Assistance Visit	\$750	\$0
• Annual Work Plan Development Session	\$500	\$0
• Windows advertising space	\$600	\$0
• visitohiomainstreet.com marketing space	\$250	\$0
• Design Assistance/Design Schematic	\$500	\$0
• Strategic Planning	\$1,000	\$0
• Tax credit assistance (1 project per downtown)	\$1,500	\$0
Total Cost	\$7,600	\$320
Main Street Program cost savings	\$3,980	