



QUARTERLY REPORT BEST PRACTICES

Communities participating at the Performing Main Street and Transforming Downtown levels of the Oregon Main Street Network (OMS) are required to submit a quarterly report using an on-line reporting system (Smartsheet) to Oregon Main Street. These reports serve a few purposes:

- OMS is required to submit statistics to the national Main Street America™ program,
- Helps OMS check-in on your local program’s progress, concerns, and overall wellbeing, and
- Communicates the overall progress of communities that are part of the OMS Network at the top tiers.

While we are required to collect this data from our local communities, the value of the data is most useful at the local level. It helps you gauge the economic activity happening in your own town and help you identify trends and areas where you need to focus your efforts. It can’t be stressed strongly enough how important these reports are.

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WHEN ARE QUARTERLY REPORTS DUE?

It is important to submit local program reports in a timely manner to give OMS the ability to respond to concerns or celebrate victories from the Network. **You will receive a link to the Smartsheet form to use in advance of the due date for each quarter’s report.** Reports are due as follows:

Quarter 1	January, February, March	Due April 10
Quarter 2	April, May, June	Due July 10
Quarter 3	July, August, September	Due October 10
Quarter 4	October, November, December	Due January 10

GENERAL TIPS AND HELPFUL HINTS ON SUBMITTING REPORTS

- These reports are for activities within your Main Street district and activities hosted by your Main Street program.
- Collect information throughout the quarter rather than waiting until the report is due using whatever tool that is easiest for you – our word form, your dbase, an excel spreadsheet, etc.
- Take your best guess. For example, if you don’t know how many full-time jobs were created by a new business, either reach out to them directly or make an educated guess.
- Relationship building is key! “Take donuts” and meet personally with the stakeholders who you will need to help you complete these reports. Define exactly what you are requesting, why you are requesting it, and when you need the information. Be prepared to send them a reminder one to two weeks in advance of your report being due:
 - Building/Planning Department – new buildings and values, housing units, commercial units, zoning issues
 - Public Works – public works projects and infrastructure investment
 - Parks & Recreation – public parks investment
 - Urban Renewal Agencies – public improvements
 - Chamber of Commerce –businesses opening and closing in district, number of employees

- Keep detailed meeting minutes for EVERY meeting, including who attends, so you know how many volunteer hours to count. Minutes are a good reminder of what was discussed, to whom tasks are assigned, and progress made. This information is helpful when it's time to write your NARRATIVE report.
- Be a "streetwalker" - Collect information in conversations as you walk around your district and talk to your stakeholders. Ask volunteers to assist you in the collection – make it fun for them!
- Make sure your Board of Directors has an idea of what information is being collected. They can help you keep a pulse on your downtown.
- If you provide sufficient NARRATIVE information and have a copy of the quarterly report sent to you by clicking the box at the end of the form, you will have a complete picture of the revitalization efforts in your district by the end of the year. Then, you will be able to use this information for an annual report to share with your board and community.

COMPLETING YOUR NARRATIVE SECTION

By year-end, you will have a complete record of your issues, opportunities, and accomplishments by completing the narrative section. You can select to have a copy of the quarterly report sent to you by checking the box at the end of the form. This can then serve as an annual report or the information within can be used to complete an annual report.

- Please do not leave any sections blank. Insert "not applicable" for the quarter if that is the case.
- A "play-by-play" for every project is not required. Just include a status report of big milestones and accomplishments.
- The "Anything Else" section is the catch all for anything else not stated elsewhere in the report.

Materials to include:

- A new board roster, if there have been any changes. Include name, business name, type of business, phone, email and mailing address.
- If you do a monthly manager report to your board or local government, include those. You can also include your minutes from Main Street board meetings. If desired, summarize this information in your report.
- Attach any relevant materials (flyers, photos, project final reports, etc.) that can be sent electronically. OMS likes to have examples to share with other programs. If you have examples that can only be shared in hard copy, list them and note that they are "available on request."
- Include your community's calendar of events with dates, times, locations, and brief descriptions of the event as an attachment to the quarterly narratives. An annual calendar is encouraged but quarterly calendars are accepted.

COMPLETING YOUR STATISTICS SECTION

Depending on the size of the community, there are many ways to collect the STATISTICS needed to complete the quarterly reports. Larger cities may require contacting several different sources while smaller communities can rely more on personal observation and communication with fewer officials. The following are suggestions on sources for different kinds of information.

BUSINESSES AND JOBS

It is strongly suggested that each community have a complete inventory of properties and downtown businesses. If you don't have one, do your best with what you have and try to start one in Excel or a dbase program. Businesses come and go regularly and can make your inventory outdated in a short time. For that reason, it is important to keep track of new businesses opening or closing and what type of businesses they are (retail, professional, restaurant, service, etc.), and jobs created or lost. Knowing the mix of businesses, the vitality of those businesses, and what types of businesses are coming and going can be valuable information for any new investors wishing to move into the district. Seasonal businesses should only be counted when they open for the first time and if they close permanently, just like any other business. Mobile/Food Truck businesses should be counted if they spend the majority (over 50%) of their business hours in the downtown district.

New, acquired, expanded, or relocated businesses and jobs within the district show direct investment in the Main Street district:

- If local government requires a business license, this is the best source for the information you will need. You can check with your city/town to find out if there is a business license required.
- If there is no business license for your community, you may need to keep your eyes open to see activity in empty spaces and stop by to introduce yourself and find out about the business and how many full- and part-time employees they plan to employ.
- You can do a survey of property owners to collect information on businesses in their properties.
- Realtors and developers may also know what businesses are coming to the district.
- If a business has expanded and added more jobs, record those.
- Also count any business that has relocated into the Main Street district from the community but outside of the district.
- Businesses from outside the community that re-locate to you community are considered a “new” business.

Closings or transferring businesses and jobs shows disinvestment in the Main Street district:

- Often the only way you know a business is going to close is when you see the empty space after they have moved out. If you develop a relationship with property owners, they will be able to share with you about space that might be coming available. Sometimes realtors will also know that a space is coming available before you do. It is good to develop a working relationship with the commercial realtors in your district. Record these businesses as soon as you know about them.
- Record the number of full- and part-time jobs lost. Also, by knowing what spaces have been vacated, you may be able to steer a potential downtown business to that space.

PUBLIC AND PRIVATE INVESTMENT

Public and private sector investment data refers to physical improvements within the district. Private sector refers to investment made in privately owned buildings or spaces regardless of the source of funds. Public sector improvements are those buildings or spaces owned by the public sector or within the public right of way.

Building rehabilitations and façade renovations:

- Building renovations are important to show investment and confidence the downtown district. Improvements may be on the inside or the outside, whether it is a complete interior remodel or simply painting the outside of the building.
- If a remodel or rehab is significant, there may be building permits issued through the building department of your city/town.
- If you can't get the information needed from your local building department, you might ask the owner for a ball-park figure for their renovation. This is much easier to do when you have a solid working relationship with building or business owners.
- Count these projects when they are completed.

Public improvements and infrastructure projects:

- Any investment your local government makes in downtown improvements is to be recorded. A new bridge? Adding trash cans? New curbs and gutters? Sewer replacement? Any money the city/town spends on improving the public areas downtown should be counted.
- Depending on the size of the community, there may be several places to get information on the public investment downtown. Typically, the improvements are made by the Public Works department of a community, or, if you have parks in your downtown, that could be through the Parks and Recreation Department. If your community has one person who handles all the contracts the city/town is involved in, they would know what is being spent. If the town is small, all of the numbers might be contained in the Finance Department.
- Do not include a public project until it has been completed. You don't want to include the numbers in more than one quarter.

Other Property Changes:

This section tracks any other changes in the district such as new infill construction or property loss due to fire or other natural disaster.

- New construction will require building permits. The building department in your city/town should have a cost of construction estimate.
- Count the new building when it is complete and ready for occupancy.

Housing units:

Housing units in the downtown can help add to vibrancy of a downtown. People who live downtown frequent the restaurants and shops more often, tend to walk within the district (putting people on the street), and have their lights on in the evenings rather than dark windows. All of these things contribute to a greater sense of activity 24/7, and show the desirability of downtown.

- It is a good idea to have a complete inventory of living units downtown, but if you don't have an inventory, start where you are, counting any new units that come on line. Eventually you will want to have a complete inventory so that you have a better idea of how many people are living in your downtown area.

Volunteer Hours

Volunteers are the heart blood of the Main Street program. In 2020 every hour donated by a volunteer is worth approximately \$27.20 (see: [https:// www.independentsector.org](https://www.independentsector.org)), which is labor the program doesn't have to pay for. Without volunteers, all of the responsibility falls on the program manager and staff, which, in many cases is only one person with a defined set of skills. Volunteers come with lots of interests, ideas, and skill sets. It is important to keep track of all volunteer hours, to let the community know that the soft dollar investment is just as important as the hard dollars.

- Number of volunteer hours - When board members are involved in board activities, such as board meetings, executive committee meetings, finance meetings, events or representing Main Street (outside of a Main Street sponsored event), or other volunteers involved in Main Street meetings, projects, and events, these should all be counted as volunteer hours. Do not count volunteer hours where someone who volunteers for the local Main Street program volunteers for another program unless they are there to represent Main Street.
- It is best to keep a running total throughout the quarter of any volunteer hours as it's too hard to remember them later. If there is a volunteer coordinator for the organization, this person would keep track of all volunteer hours. Minutes of meetings should list attendees. Volunteers for any specific project should keep track of their volunteer hours and report them to the program manager.
- Hours over 40 for full-time, salaried Program Managers are not counted as volunteer hours.
- Here are some Online tools available for tracking volunteers:
 - Volunteerspot
 - Volunteerhub
 - Volgistics
 - Samaritan
 - Handsonconnect
 - Signupgenius

FREQUENTLY ASKED QUESTIONS

How much time will the STATISTICS portion of the report take to complete?

If you have been diligent about keeping track of statistics in your district throughout the quarter, it should just be a matter of finalizing the quarterly statistics form. This should only take about half of an hour. If you haven't collected all the information, it may take you up to a week to get the information you need from your various contacts.

How much time will the NARRATIVE portion of the report take to complete?

Plan to spend one to two hours on this portion of the quarterly report. You can keep notes throughout the quarter about what you want to include in the report which will help save time at the end of the quarter to finalize. It is important to be thorough to give OMS a comprehensive idea of how your Main Street program is progressing, help you address any concerns, and to request assistance, if needed.

Why are the STATISTICS from each community important to OMS?

The STATISTICS from each community are combined quarterly by OMS to give a comprehensive picture of the value and impact of the state-wide program. At the end of the year, OMS sends a comprehensive statistical report to the National Main Street Center, which combines the reports from all of the national Main Street programs to show the impact of the Main Street revitalization model throughout the country. Over the years, the cumulative totals have shown millions of dollars of investment in our downtowns, both public and private, as well as the number of businesses and jobs created, number of housing units created, and volunteer hours contributed to make our downtowns vibrant.

What if there are no new STATISTICS to report from one report to the next?

You will need to put 0 and then where there are drop down menus select the “none” option to indicate there isn’t data to report for that questions.

Why is the NARRATIVE portion of the report necessary?

STATISTICS can only tell one side of a community’s story. The NARRATIVE gives each community a chance to brag about their successes and share their concerns with OMS. By reporting quarterly, OMS can stay on top of each community and address concerns before they become more difficult to solve. This is an opportunity to talk about challenges you may have had, successes or compliments you may have received, any “aha moments” or new ideas you might wish to pursue. The more COMS knows about what your program is doing, the more they can help you achieve program goals.

Besides sending this report to OMS, who should the reports be shared with?

At the very least, the STATISTICS reports should be shared quarterly with the local board of directors. On most occasions you should also share the NARRATIVE with the board, unless there is sensitive information that you only want to share with OMS. Board members may be vaguely aware of some of the changes taking place downtown, but most business people are more familiar with what is happening with their own business, and perhaps the area right around them, than they are with the whole district. It is a way to share the successes and voice concerns with your local governing board. They may not be aware of the number of businesses opening and closing, properties sold, or number of volunteer hours donated. This also gives them great talking points to continue to promote the local Main Street program.

Beyond the board, it is a good idea to share with your local government the impacts of the Main Street program. It helps to build credibility for the program and can sometimes help to secure funding and support from the community. It also is a way to communicate future plans, projects and concerns. Some communities do an annual report to share with the community and to put on their websites. An annual report is a good tool to share at your annual meeting (if you have one).

You can also share the STATISTICS with partner organizations (economic development, chamber of commerce, the newspaper, etc.) and on social media. For example, touting the amount of public improvements/infrastructure in your district is a great way to encourage and sell a prospective business on locating in your downtown.