

2019

ANNUAL EVALUATION

REPORT

OAKLAND COUNTY, MICHIGAN



2019 EVALUATION REPORT

The following evaluation was been completed by:

Name/Role _____

Organization _____

Email _____

Telephone _____

Date _____

MAIN STREET OAKLAND COUNTY

Main Street Oakland County (MSOC) is a program of Oakland County Economic Development and Community Affairs. MSOC is a Coordinating Program of Main Street America.

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INTRODUCTION

This document – the Annual Evaluation Report – is specific to Main Street Oakland County (MSOC) communities. It provides a summary of the local Main Street program’s annual evaluation, including observations and recommendation, based on the Main Street America™ Standards of Performance.

Main Street Oakland County

Main Street Oakland County (MSOC) is a coordinating program of Main Street America™ and is currently the only county-wide coordinating program in the country. Main Street offers a framework for preservation-based economic development and community development through the Main Street Approach for communities of all types including traditional downtowns, commercial districts in urban neighborhoods, rural towns and smaller or mid-sized cities. MSOC offers a three-tier program including Select, Associate and Affiliate Level member communities.

Main Street America™ Standards of Performance and Accreditation

MSOC works with Select Level member communities to achieve and maintain Main Street America Accredited™ status. During the annual evaluation process, the local Main Street program is measured against the Main Street America™ Standards of Performance. These standards of performance are used for designating programs as Main Street America™ Accredited members.

Evaluation Report

The local Main Street program will be evaluated based on the information gathered from the Community Self-Evaluation and during the evaluation visit, along with onsite interviews with local stakeholders, including board members, committee members, executive director and staff, municipal partners, local businesses, residents, and property owners. This report is a summary of those observations and recommendations.

Accreditation Designation

In order for a local program to be designated as a Main Street America Accredited™ community, they must receive a minimum score of 7 points out of 10 for each of the ten Standards of Performance is required. Partial points may be awarded for individual indicators where appropriate (ex. 0.5 or 1.25). Receiving status as a Main Street America Accredited™ community is a prestigious designation.

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MAIN STREET AMERICA™ STANDARDS OF PERFORMANCE

Your local Main Street programs will be evaluated on Main Street America™ Standards of Performance. A minimum score of 7 points out of 10 for each of the ten standards is required for Main Street America Accredited™ community. Below are the points the local Main Street program has received in each of the ten Standards of Performance.

- | | |
|--|-----------------|
| 1. Broad-based Community Support | Points _____/10 |
| 2. Vision and Mission Statements | Points _____/10 |
| 3. Comprehensive Work Plan | Points _____/10 |
| 4. Historic Preservation Ethic | Points _____/10 |
| 5. Active Board and Committees | Points _____/10 |
| 6. Adequate Operating Budget | Points _____/10 |
| 7. Paid Professional Executive Director | Points _____/10 |
| 8. Program of Ongoing Training | Points _____/10 |
| 9. Reporting of Key Statistics | Points _____/10 |
| 10. Main Street America Membership | Points _____/10 |

SUMMARY AND RECOMMENDATIONS

Please use this space to provide a general summary of the annual evaluation.

- Do you recommend Accreditation?
- What are the programs greatest strengths? Weaknesses?
- What improvements have been made over the last year?
- What are the top 2-3 priorities the local program should focus on this next year?

1. BROAD-BASED COMMUNITY SUPPORT

At its best, a local Main Street organization 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. By actively involving a broad range of interests and perspectives in the revitalization process, the Main Street organization leverages the community's collective skills and resources to maximum advantage. Involvement by both the public and private sectors is critical to development of the downtown district. Ideally, both sectors will participate in the downtown management process by providing funding, leadership, volunteering and by encouraging collaboration. The overall goal is for a broad range of participation and support for the downtown district.

Indicators:

1. Board represents a wide cross-section of the community may including: chamber, city, preservation organization, district property owner, district business owner, resident, large employer, other community institution/organization (see DDA, PSD, BID of specific legal requirements). (2 points)
2. Organization works with municipal government elected and appointed officials (mayor, city/village manager, council president, and planning commission chair) to develop an understanding and commitment to downtown revitalization. (1 point)
3. Volunteers represent a wide cross-section of the community. (1 point)
4. Organization actively works to recruit new volunteers, retain and grow the capacity of current volunteers. *Provide Examples* (1 point)
5. Organization maintains regular contact with business, property owners and other community organizations, looking for opportunities to engagement in mutually beneficial collaborations. (1 point)
6. Organization maintains an active public relations campaign that includes tools such as a newsletter, updated website, Facebook page, twitter account, press releases, annual meeting and annual report. (1 point)
7. Organization advocates for the local Main Street program and commercial district revitalization by reaching out to local organizations, community leaders, and/or elected officials.
Provide Examples
(1 point)
8. Organization partnered with another organization(s), which includes a wide variety of stakeholders such as chambers, historic or historical society, schools, large local employers, or business association for an event, project, program, promotions, or advocacy that contributes to downtown revitalization. (1 point)
9. Community contributes financial, in-kind, and volunteer support for the revitalization program.
Provide Examples (1 point)

Evaluator Scoring:

Standard 1 - Indicators	Pt. Value	Pts. Earned
1. Board representation	2	
2. Collaboration with municipality	1	
3. Volunteer representation	1	
4. Volunteer recruitment and retention	1	
5. Regular contact with stakeholders	1	
6. Active public relations campaign	1	
7. Advocacy for local Main Street program	1	
8. Partnerships with other organizations	1	
9. Community contributions	1	
Total Points	10	

Evaluator Comments:

Please provide your comments here.

2. VISION AND MISSION STATEMENTS

A vision statement communicates and describes the Main Street organization's long-term aspirations and intentions for the downtown district. A mission statement communicates the Main Street organization's sense of purpose and overall direction, by stating the method to achieve the community's vision for their downtown. Both should be developed with broad participation by the board, committees, volunteers, and community input. *At a minimum*, the Main Street organization should have a mission statement in place, reviewed annually (and updated, if appropriate). If the organization does not have a vision statement at the beginning of the revitalization process, it should develop one prior to the organization's transition from the catalyst phase to the growth phase.

Indicators:

1. Organization has a current, clear and appropriate vision statement (or written long-term goals) formally adopted by the board of directors. (2 points)
2. Organization has a current, clear and appropriate mission statement formally adopted by the board of directors. (2 points)
3. Board uses the vision and mission statements to drive the organization's work plans.
Provide Examples (2 points)
4. Board members are familiar with the vision and mission statements. (1 point)
5. Board reviews the vision statement on a yearly basis for continued relevancy. (1 point)
6. Board reviews the mission statement on a yearly basis for continued relevancy. (1 point)
7. Organization actively promotes the vision and mission statements to the public using tools such as its website, business cards, press releases, banners, etc. *Provide Evidence* (1 point)

Evaluator Scoring:

Standard 2 - Indicators	Pt. Value	Pts. Earned
1. Has a vision statement	2	
2. Has a mission statement	2	
6. Vision and mission drive work plans	2	
3. Board members are familiar with both	1	
4. Vision statement is reviewed annually	1	
5. Mission statement is reviewed annually	1	
7. Promotes vision and mission statements	1	
Total Points	10	

Evaluator Comments:

Please provide your comments here.

3. COMPREHENSIVE WORK PLAN

A comprehensive annual work plan provides a detailed blueprint for the Main Street organization activities; reinforces the program's accountability both within the organization and in the broader community; and provides measurable objectives by which the organization can track its progress.

Indicators:

1. Organization establishes work plans annually, developed by the full board with input from volunteers and committees, with measurable goals, objectives, specific tasks, desired outcomes, completion dates, budgets/costs, and timelines with multiple volunteers. (2 points)
2. Organization distributes work plan activities and tasks to a broad range of volunteers and program participants. (1 point)
3. Organization ensures work plan or a customized work plan system assigns tasks by name to specific board, volunteer, and staff members based on skills, interests, resources, and availability. Majority of task are not to be assigned or completed by staff. (1 point)
4. Organization utilizes work plans for volunteer recruitment, sponsorship, solicitations, public relations, business recruitment, and project implementation. (1 point)
5. Organization has made significant progress in each of the four points based on the work plan submitted for the previous year. (1 point)
6. The work plans contain a balance of activities in each of the four broad program areas that comprise the Main Street approach — design, organization, promotion, and economic restructuring.
 - Economic Vitality (1 point)
 - Design (1 point)
 - Organization (1 point)
 - Promotion (1 point)

Evaluator Scoring:

Standard 3 - Indicators	Pt. Value	Pts. Earned
1. Annual work plans process	2	
2. Distribution of work plan tasks	1	
3. Work plan tasks assigned by name	1	
4. Used to recruit volunteers and partners	1	
5. Work plans resulted in progress	1	
6. Work plans address Four Points		
Economic Vitality	1	
Design	1	
Organization	1	
Promotion	1	
Total Points	10	

Evaluator Comments:

Please provide your comments here.

4. HISTORIC PRESERVATION ETHIC

Historic preservation is central to the Main Street program's purpose and is what makes historic and traditional commercial districts authentic places. Historic preservation involves saving, rehabilitating, and finding new uses for existing buildings, as well as intensifying the uses of the existing buildings, through building improvement projects and policy and regulatory changes that make it easier to develop property within the commercial district. The historic buildings and public spaces of the downtown district enrich civic life and add value to the community's sense of place. Developing a historic preservation ethic is an ongoing process of education for a community and for a local Main Street organization.

Indicators:

1. There have been positive changes in the appearance of downtown over the last year including appropriate façade and building rehabilitation projects, new signage, awnings and maintenance. (2 points)
2. Organization builds public awareness for the commercial district's unique historic assets and for good design. May include educational public awareness activities on historic preservation throughout the year and special activities during National Historic Preservation Month in May. (2 points)
3. Representatives from the organization attended preservation trainings or workshops, includes local, county, state, or national programs. (1 point)
4. Organization provided property owners with access to local design assistance or local façade grant program and/or utilized Main Street Oakland County design assistance or historic preservation services. (1 point)
5. Municipality maintains an active design review board that includes the downtown district, or the Main Street organization utilizes design guidelines to review façade improvements and all other physical improvements. (1 point)
6. Organization works proactively to protect historic resources and encourage rehabilitation as an economic development tool. Organization responds to threatened buildings with education, resources, and creative adaptive use. (1 point)
7. Organization is engaged in the preservation or rehabilitation of a local historic building or resource through planning, technical assistance, financial, partnerships, and marketing. (1 point)
8. Organization maintains a current building inventory, and supports and/or actively pursues historic designation. Downtown district or building(s) are listed on the National Register of Historic Places. (1 point)

Evaluator Scoring:

Standard 4 - Indicators	Pt. Value	Pts. Earned
1. Positive change in the appearance	2	
2. Celebrate unique history	2	
3. Preservation trainings	1	
4. Design assistance	1	
5. Design review and guidelines	1	
6. Advocate for rehabilitation	1	
7. Engage in rehabilitation project	1	
8. Maintain building inventory	1	
Total Points	10	

Evaluator Comments:

Please provide your comments here.

5. ACTIVE BOARD AND COMMITTEES

Downtown Development by nature is a community-driven process. Therefore, community members must take an active role in leading and implementing positive change. While the Executive Director is responsible for facilitating the work of volunteers, this staff member is not tasked with single-handedly revitalizing the commercial district. The direct involvement of an active board of directors and committees are keys to success. Main Street organizations that have direct involvement by the board of directors and project committees increase the chance of long-term success, by maintaining focus on its particular purpose to carry out the mission and work plan.

Indicators:

1. Organization has by-laws document, board member commitment letter, board member job description, and formal board member orientation. (2 points)
2. Board met regularly (monthly, bi-monthly), has a well-managed process with advanced agenda and regular distribution of minutes (1 point)
3. Board as a whole is active in the development of partnerships, fundraising for the organization, and advocacy for downtown. (1 point)
4. Board members serve as either an officer or project committee member. (1 point)
5. Committee members assume responsibility for the implementation of the work plan. (1 point)
6. Organization maintains active committees and task volunteers has completed projects which should contain a balance of activities in each of the four broad program areas that comprise the Main Street approach — design, organization, promotion, and economic restructuring.
 - Economic Vitality (1 point)
 - Design (1 point)
 - Organization (1 point)
 - Promotion (1 point)

Evaluator Scoring:

Standard 5- Indicators	Pt. Value	Pts. Earned
1. Board adopted by-laws and policies	2	
2. Board meets regularly	1	
3. Board is active in development (partners and funds)	1	
4. Board members are officers or committee members	1	
5. Committee members assume responsibility for tasks	1	
6. Committees address Four Points		
Economic Vitality	1	
Design	1	
Organization	1	
Promotion	1	
Total Points	10	

Evaluator Comments:

Please provide your comments here.

6. ADEQUATE OPERATING BUDGET

In order to be successful, a Main Street organization must have the financial resources necessary to carry out its annual and evolving 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).

Indicators:

1. Organization is taking steps to ensure long-term financial stability and the board has completed and adopted a multi-year strategic fundraising plan. (2 points)
2. Board has adopted a comprehensive Financial Policies/Procedures document. May include process for financial oversight and management by both the Main Street organization and municipality. Organization has an annual audit or review of treasury. (1 point)
3. Organization has an active treasurer who makes regular monthly financial reports to the board. (1 point)
4. Organization has in place a diversified revenue sources and may include the following sources: Business Improvement Districts (BID), charitable contributions, contract for services, community organizations, co-op advertising, corporate sponsorships, DDA property levy (millage), DDA TIF, donations, earned income (festivals, product sales, etc.), formal, membership program, municipal support, Principal Shopping District (PSD), special assessment, sponsorship, and other. (1 point)
5. Budget is adequate to achieve the organization's goals and other expenses. (1 point)
6. Budget is adequate to cover staff salary, fringe benefits and other administrative expenses. (1 point)
7. Budget is adequate to cover professional training and development and the associated travel of staff, board and volunteers. Budget includes travel expenses to MSOC workshops, and National Main Streets Conference. (1 point)
8. Budget specifically includes revitalization of the traditional downtown commercial district. DDA or Main Street funds are entirely devoted to projects in the DDA or Main Street district, including contractual agreements related to DDA or Main Street administration. (1 point)
9. Contractual agreements are in place for payment of services provided by or to the municipality where applicable. (1 point)

Evaluator Scoring:

Standard 6 - Indicators	Pt. Value	Pts. Earned
1. Strategic funding plan for long-term sustainability	2	
2. Board adopted financial policies and procedures	1	
3. Active treasurer provides monthly reports	1	
4. Diversified revenue sources	1	
5. Adequate to achieve program goals and expenses	1	
6. Adequate to cover staff salary and expenses	1	
7. Adequate to cover professional trainings	1	
8. Specific budget for revitalization	1	
9. Contractual agreements with municipality	1	
Total Points	10	

Evaluator Comments:

Please provide your comments here.

7. PAID PROFESSIONAL EXECUTIVE DIRECTOR

Coordinating a successful Main Street organization requires a trained, professional staff person whose sole job focus is the downtown. Ideally, the Main Street Executive Director's position is full time (generally 40+ hours per week). In small towns (with populations under 5,000) without the resources to hire a full-time Executive Director, a part-time director may be acceptable (generally 20+ hours per week).

Date of hire for Main Street Executive Director: _____

Date of Executive Director annual evaluation: _____

Requirement:

1. Executive Director received a formal written evaluation, during which performance expectations & compensation package of Executive Director Staff were reviewed/reviced. Unless a recently hired Executive Director for less than 12 months. Yes or No? _____

Indicators:

2. Organization has staff management policies and procedures in place. (2 points)
3. Executive Director was in place for at least 9 months during calendar year. Ideally, transition between Executive Directors should be no more than 3 months. (2 points)
4. Executive Director salary and benefits are consistent with similarly situated main street programs and appropriate based on job responsibilities and individual skills and experience. (2 points)
5. Executive Director answers to and has only one boss, typically the board chair and works exclusively for the Main Street organization. (1 point)
6. Organization provided staff with professional development opportunities. (1 point)
7. Executive Director makes regular monthly reports to the board. (1 point)
8. Executive Director makes street-time an integral part of their day to day activities. (1 point)

Evaluator Scoring:

Standard 7 - Indicators	Pt. Value	Pts. Earned
1. Annual executive director evaluation (Required)	Y/N	
2. Staff management policies in place	2	
3. Executive director in place for at least 9 months	2	
4. Executive director salary and benefits	2	
5. Executive director has only one boss	1	
6. Professional development opportunities	1	
7. Regularly monthly reports to board	1	
8. Executive director is active	1	
Total Points	10	

Evaluator Comments:

Please provide your comments here.

8. PROGRAM OF ONGOING TRAINING FOR STAFF AND VOLUNTEERS

As the Main Street program evolves, staff and volunteers will need to sharpen their skills to meet new challenges. In the catalyst phase, new staff and volunteers will need basic training. This is true as well as throughout the life of the organization because there will be turnover. As the program matures, new skills will need to be cultivated to tackle more complex projects. Program staff and volunteers should stay current on issues that affect historic commercial districts and on new development techniques and models.

Indicators:

Executive Director:

1. Executive Director attended the National Main Street Conference (2 points)
2. Executive Director has attended 3 main street relevant training opportunities this year. (2 points)

Main Street

- Main Street 101 Training
- MSOC Workshop(s)
- Main Street Advisory Board Workshop
- Historic Preservation Workshop
- Main Street America Institute

Related Trainings

- Oakland County Planners Gathering
- Oakland County Heritage Conference
- Michigan Downtown Association (MDA)
- Michigan Association of Planning (MAP)
- American Planning Association (APA)
- Urban Land Institute (ULI)
- Michigan Municipal League (MML)
- Other: _____

3. Executive Director attended all 3 of the quarterly MSOC manager meetings. (1 point)

Board and Volunteers:

4. Board member(s) and/or organization representative(s) attended the National Main Street Conference. (1 point)
5. Board members are attending and taking advantage of MSOC trainings and workshops. (1 point)

Organization:

6. Organization has an orientation process in place to acclimate new volunteers and board members. (1 point)
7. Organization makes available and uses appropriate reference and training materials. (1 point)
8. Organization recognizes the need for continuing education for new and existing staff, board, and committee members. (1 point)

Evaluator Scoring:

Standard 8 - Indicators	Pt. Value	Pts. Earned
1. Executive director attended National Conference	2	
2. Executive director attended relevant trainings	2	
3. Executive director attended 3 quarterly meetings	1	
4. Board/volunteers attended National Conference	1	
5. Majority of board attended at least one MSOC training	1	
6. Volunteer orientation process in place	1	
7. Makes available reference and training materials	1	
8. Recognizes need for continuing education	1	
Total Points	10	

Evaluator Comments:

Please provide your comments here.

9. REPORTING OF KEY STATISTICS

Tracking statistics — reinvestment, job and business creation, and so on — provides a tangible measurement of the local Main Street organization’s progress and is crucial to garnering financial and programmatic support for the development effort. Statistics must be collected on a regular, ongoing basis.

Indicators:

1. Organization submitted complete quarterly reinvestment statistic reports for each quarter as noted below. (8 points)

	2 points	1 point	0 points
1st Quarter January-March	April 1-30	May 1-15	After May 15
2nd Quarter April – June	July 1-31	August 1-15	After August 15
3rd Quarter July-September	October 1-31	November 1-15	After November 15
4th Quarter October-December	January 1-31	February 1-15	After February 15

2. Organization regularly communicates to the community at-large about the program’s success through key statistics in press releases, newsletters, special programs, advocacy, etc. (1 point)

3. Organization uses statistics strategically to inform work plans. (1 point)

Evaluator Scoring:

Standard 9 - Indicators	Pt. Value	Pts. Earned
1. Reports statistics		
1st Quarter	2	
2nd Quarter	2	
3rd Quarter	2	
4th Quarter	2	
2. Communicate program successes	1	
3. Uses statistics in work planning	1	
Total Points	10	

Evaluator Comments:

Please provide your comments here.

10. MAIN STREET AMERICA MEMBERSHIP

Participation in the Main Street America Network membership program connects local programs to their counterparts throughout the nation, providing them with valuable information resources and creating a sense of community.

Indicators:

- Organization is a current Main Street America Network member. (10 points)

Membership #: _____

Date of expiration: _____

Evaluator Scoring:

Standard 10 - Indicators	Pt. Value	Pts. Earned
Current member	Y/N	
Total Points	10	

Evaluator Comments:

Please provide your comments here.

ANNUAL EVALUATION REQUIREMENTS

The following items were provided by the community.

Completed Community Self-Evaluation:

- ___ Community Self-Evaluation completed by the Executive Director
- ___ Community Self-Evaluation signed by the Board Chair

Required Materials:

- ___ A. Annual Review for the Main Street Executive Director (Required for National Accreditation)
- ___ B. Evaluation schedule and location(s) address
- ___ C. Organization's vision and mission statements
- ___ D. 2019 Annual Budget
- ___ E. 2019 Board meeting schedules
- ___ F. Board Member roster (with members' contact information, position and terms)
- ___ G. (Project) Committee Member roster (with contact information and position)
- ___ H. Board and Committee project work plans from prior year and current year
- ___ I. Annual salary and benefits information for Main Street Executive Director
- ___ J. Organization bylaws
- ___ K. Last 2019 monthly financial report as presented to the board

The following examples were available on-hand during the evaluation meetings:

- ___ Board and (Project) Committee agendas and minutes for 2019
- ___ Downtown Development Plan and or Strategic Plan (and related plans)
- ___ Market Study (if applicable)
- ___ Map of the downtown district

EVALUATION SCHEDULE & ATTENDEES
