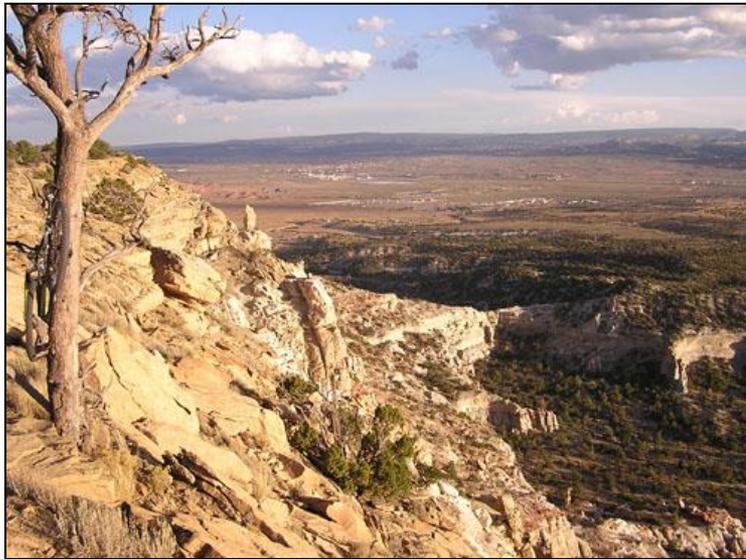


# “Show Me the Money”: or at least the road to get on....



“Coffee is for closers only.”

—Movie: Glengarry Glen Ross, 1992

Grants, NM --- June 27, 2013

Presentation for NWCOCG Local Infrastructure Seminar

## “Getting HIP”



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# Agenda

- ✓ Prerequisites: "Preparation"
- ✓ Planning: "Game Plan"
- ✓ Coaches: "Technical Assistance Providers"
- ✓ Access Points: "Know the Game"
- ✓ Keys to Game



# Preparation: What do I do?

## ✓ **Strategic Community Plan (20+ Year Vision/Input)**

- Comprehensive Plan, Growth Management Master Plan, Community Land Use Plan, State Long-Range Transportation Plan

## ✓ **Infrastructure Capital Improvement Plan**

- Community Description / Short Summary of Community Plan
- Inventory of Assets
- 5-Year Prioritized Road Map – Project & Resource Development Plan**

## ✓ **Budget & Audit**

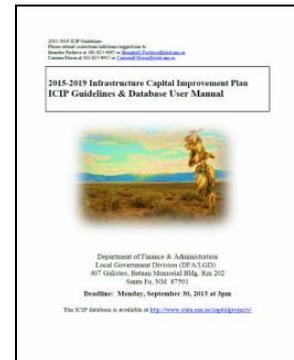
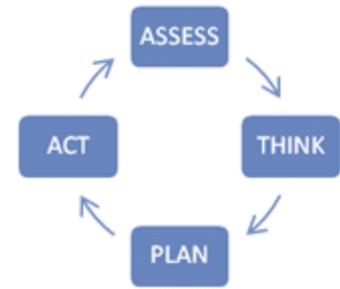
- Submitted & Approved
- Tied to Planning Goals and Action Plan
- Tiered Financial Review

## ✓ **Track Record**

- Past Performance – Spending What You Already Have
- Avoid the “Black List”

## ✓ **Do Your Homework**

- Are you eligible? What are the requirements? Create a checklist?
- Project Prospectus: Community History/Description, Data, Supporting Docs (PER, ROW, Resolutions)



Project Name	Project Budget	Other Funds	Other Sources
1. Project Name			
2. Project Name			
3. Project Name			
4. Project Name			
5. Project Name			
6. Project Name			
7. Project Name			
8. Project Name			
9. Project Name			
10. Project Name			

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# Planning: What is the Game Plan?

## ✓ **Create Top Priority Projects**

### ✓ **Phase Projects**

- Planning
- Design
- Construction Phases (stand-alone)

### ✓ **Develop a Action Plan / Plan for the Process**

- Action / Timeframe / Responsible Party
- Back fill to deadlines

### ✓ **Develop a Strategy**

- Media, Consultations, Presentation, Press Releases, etc.
- Know the Audience: Why should I care, Why should I invest in this and you?

### ✓ **Get it into local and regional plans – “hoppers”**

### ✓ **Get support**

- Resolutions, Letters of Support, Petitions, Testimonials

### ✓ **Be Your Best Advocate or Champion**

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# Coaches: Who do we ask?

New Mexico Rural Water Association	Matt Holmes
Rural Community Assistance Corporation (RCAC)	Blanca Surgeon, Liz Bernal
NW Council of Governments	Planners: Marco Pablo & Prestene Garnenez RTPO: Bob Kuipers
NM Local Government Division	ICIP: Carmen Morin, Jimmy Rodriguez CDBG: Maria Urban, Ryan Serrano Budget: John Gallegos, Paul Ludi
Navajo Nation Local Governance Support Centers	Crownpoint: Marjorie Lantana Shiprock: Eliza-beth Washburn
NM Land Grant Council	Cristina Martinez
Other Entities like Yours (Role Models)	Chapter CSC, Office Managers
Indian Affairs Department/Tribal Liaisons	Each State Department has a Liaison

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# Full Cycle Planning / Full Circle Funding

A planning philosophy, created by Jeff Kiely, that teaches that for all projects one must:

- Plan throughout the entire 365-day period;
- Create a well described project prospectus / proposal and budget; and
- Submit and advocate to many different investment sources to completely fund a project.



**“When planning for a year, plant corn.**

**When planning for a decade, plant trees.**

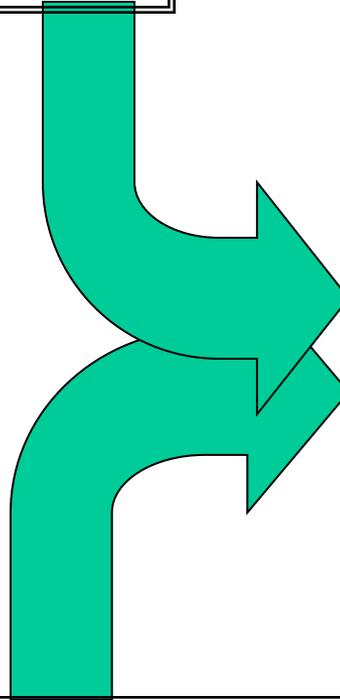
**When planning for life, train and educate people.”**



# **REACHING A BALANCE AT THE CROSSROADS**

## **QUALITY COUNTY SERVICES**

(Day-to-Day Activities)



## **TOOLBOX OF RESOURCES:**

1. Officials and Committees & Staff Experience
2. Community Plan
3. Local Budget
4. Full Cycle Planning / Full Circle Funding
  - Infrastructure Capital Improvement Plan (ICIP)
  - Project & Resource Development Plan
  - Project Prospectus
5. Technical Assistance Providers

## **STRATEGIC PROJECTS & PROGRAMS**

(Proactive Activities)



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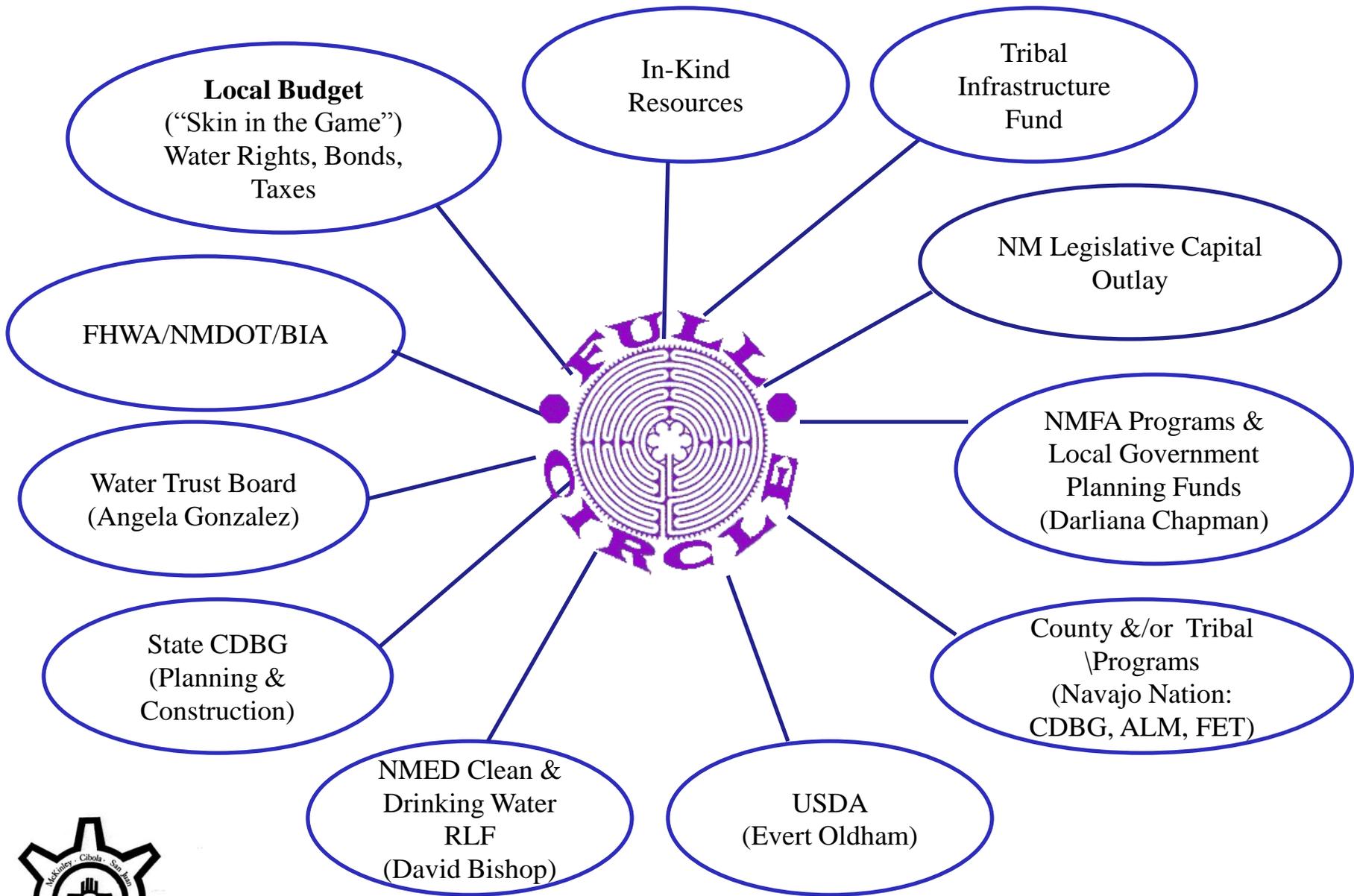
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# Legislative Capital Outlay Process:

- Dates: mid-January
  - 2013-14: 30 days
  - 2014-15: 60 days
- Sources:
  - Severance Tax Bonds – Capital Projects/Infrastructure
  - General Obligation Bonds – Seniors, Libraries, Schools, & Universities
  - General Fund
- Broken down between Executive and Legislature (\$200M)
- Capital Outlay Form
- Executive Order 2013-006 – budget, audits, quarterly reports



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*Northwest New Mexico Council of Governments*

# ANNUAL TIME CYCLE OVERVIEW

## April—May

- (1) **Final TIF Review & Presentations (April)**
- (2) Present 6-year CIP to TCDC (April 1<sup>st</sup>)
- (3) **Water Trust Board Threshold/Questionnaire Due**

## February—March

- (1) Financial Analysis by OMB and CIO to determine \$ availability (Feb 1<sup>st</sup>)
- (2) **Legislative Capital Outlay Request Forms (Feb 11<sup>th</sup>)**
- (3) **TIF Threshold – entities must be closed out to be eligible**
- (4) Project Proposals due to CIO from Chapters (March 1<sup>st</sup>)

## January

- (1) Status Report on previous CIP appropriations (1<sup>st</sup>)
- (2) **CDBG Applications Due (11<sup>th</sup>)**
- (3) **New Mexico Legislature Opens (Jan 15<sup>th</sup>)**
- (4) **PIF's are due to RTPO**

## November - December

- (1) **Water Trust Board Applications Due (early Nov)**
- (2) **TIF Project Interest Forms Deadline (Nov)**
- (3) **Navajo FET Applications (Nov 15<sup>th</sup>)?**
- (4) **Priorities NM Legislative Priority Projects / Consultations**
- (5) **Inventory existing NN Facilities (Dec 1<sup>st</sup>)**
- (6) **CDBG Threshold (Dec 14<sup>th</sup>) & Surveys are Due (Dec 28<sup>th</sup>)**

## October

- (1) **Needs Assessment Survey Due/ Chapters (1<sup>st</sup>)**
- (2) **NM Annual Infrastructure Conference**  
*[ABQ, October 21-23, 2013]*
- (3) **CDBG & TIF Application Workshops**

NMFA/CDBG Planning Grants are accepted year round.

## May

**NM Local Government Certifications of Severance Tax Bonds (STB) / Capital Outlay Projects**  
*from Local Governments, Tribes, Pueblos*

## May—June

**Budgeting** -*Local Govt Only Prelim Budgets Due (June 1)*

## June - July

- (1) **NM ICIP Training Workshops (6/22, Shiprock & 6/23, Grants)**
- (2) **TIF Awards – Board vets & announces, release of funds**
- (3) **Navajo CDBG Applications?**
- (4) Present 6-year CIP to NN Council
- (5) **CDBG & Water Trust Board Workshops**

## August-September

- (1) **Water Trust Board Pre-Application**
- (2) **TIF Project Implementation Workshop**
- (3) **Notice of next fiscal year's TIF Availability**
- (4) **NM ICIP Due (September 31<sup>st</sup>)**

# Keys to the Game:

- Do your homework
- Try and try again
- Get into Plans
- Learn and Be the Buzz Words – Walk the Walk:  
(Regional, Project-Ready)
- Cut & Paste
- Be a Fierce Advocate
- Regional Funders' Roundtable – Bring to You
- Be Accountable for Money You Get

## Trends:

- Regionalize
- Need vs. Ready

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