

— Community —
Heart & Soul™

FIELD
GUIDE

Guided by what matters most



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Mission

The Orton Family Foundation seeks to empower people to shape the future of their communities by improving local decision-making, creating a shared sense of belonging, and ultimately strengthening the social, cultural, and economic vibrancy of each place.

HISTORY

The Orton Family Foundation was founded by Lyman Orton, a seventh generation Vermonter, who served on his town's planning commission and witnessed first-hand the challenges communities face in balancing growth with maintaining small town character. Together with Noel Fritzingler, and supported by profits from Lyman's iconic retail and direct mail business, The Vermont Country Store, the Foundation was started in 1995.

The idea behind the Foundation was to find a way to empower all residents to shape the future of their communities and uphold the unique character of each place. Lyman was passionate about inverting the pyramid so that planning in a community was, in fact, community-based planning that started from the ground up with genuinely broad involvement from all sectors, all neighborhoods, all members of the community.

The Foundation developed [CommunityViz®](#), a 3-D mapping and visualization tool used by hundreds of communities across the country to "see" and analyze the impact of various development scenarios on their towns. CommunityViz laid the groundwork for the Foundation's signature Community Heart & Soul™ process described in this Field Guide.

After more than a decade of listening, learning, and refining—working in tandem with more than a dozen small towns in New England and the Rocky Mountain West—Community Heart & Soul is a proven resident-driven approach that does much more than draw lines on maps. Heart & Soul mends fences, restores trust, and reconnects communities in ways that create a ripple effect throughout towns, moving them forward with a renewed sense of purpose and place.

We welcome you to join us, and to learn with us, as we come together to help small towns in America build their own successful futures.

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Contents

Community Heart & Soul	3
Heart & Soul Principles	5
How To Use This Field Guide	9
Heart & Soul Step-by-Step	11
Phase 1 Lay the Groundwork	13
Step 1 Get Organized	15
Task 1.1 Form a core team	15
Task 1.2 Assess community readiness	15
Task 1.3 Scope out the process	17
Task 1.4 Expand the team	17
Task 1.5 Understand community networks	18
Step 2 Create a Roadmap	20
Task 2.1 Refine the proposal	20
Task 2.2 Design an engagement strategy	20
Task 2.3 Create a work plan and budget	21
Step 3 Spread the Word	22
Task 3.1 Develop a communications strategy	22
Task 3.2 Prepare communication tools and materials	24
Task 3.3 Build an audience	25
Phase 2 Explore Your Community	26
Step 4 Gather Stories	29
Task 4.1 Listen and learn	30
Task 4.2 Organize the data	31
Task 4.3 Share the stories	33
Step 5 Identify Community Values	33
Task 5.1 Draft community values and goals	33
Task 5.2 Review and confirm values and goals	36
Task 5.3 Finalize values and celebrate	37
Step 6 Get Oriented	37
Task 6.1 Examine the situation	37
Task 6.2 Refine the goals	38

Contents (continued)

Phase 3 Make Decisions	40
Step 7 Develop Options	42
Task 7.1 Gather ideas	42
Task 7.2 Turn ideas into options	42
Step 8 Make Choices	44
Task 8.1 Evaluate options	44
Task 8.2 Develop and review recommendations	46
Task 8.3 Finalize recommendations	46
Step 9 Formalize Decisions	47
Task 9.1 Craft the plan	47
Task 9.2 Adopt the plan	48
Task 9.3 Celebrate the milestone	49
Phase 4 Take Action	50
Step 10 Mobilize Resources	52
Task 10.1 Set up a stewardship team	52
Task 10.2 Gather and align resources	53
Task 10.3 Sustain commitments and momentum	54
Step 11 Follow Through	55
Task 11.1 Initiate actions	55
Task 11.2 Monitor and adjust	55
Step 12 Cultivate Heart & Soul	57
Task 12.1 Foster a participatory culture	57
Task 12.2 Embed values in decision making	57
Beginning at the Ending	59
Acknowledgments	60



THIS FIELD GUIDE EXPLAINS COMMUNITY HEART & SOUL™,
the Orton Family Foundation’s approach to strengthening communities.

This approach is a step-by-step process that will get people to participate in making decisions and taking action to improve the place where they live, work, learn, and play.

The process focuses on getting everyone involved in finding ways to protect, restore, or enhance their community’s identity—its heart and soul—over the long term.



There's
something
special about
every town.

Community **HEART & SOUL™**

There's something special about every town—the old downtown, the pastures or woodlands, a get-it-done spirit, or an everyone-is-welcome ethic.

Whether they are real places, traditions, or attitudes, these community characteristics are the things that really matter to the people who live there. They draw people to a place and make them care about where they live. Such characteristics are a community's heart and soul.

The Orton Family Foundation believes that the strength of a community lies in the hands and the hearts of the people who live there, and that the community's heart and soul is the common cause that they will rally around. Communities that acknowledge and value their heart and soul are able to take action to strengthen it.

When a community takes the time to get to know itself, it gains a sense of **identity and purpose** that informs decisions about its future.

» *Lyman Orton, Founder, Orton Family Foundation*

Across America, small cities and towns struggle to prosper and are often ill prepared to deal with change. National and global trends have enormous local impacts. National tax or energy policies can change the regional economy overnight. In a shifting global economy, multi-national companies might close down local factories, requiring families to move away to find jobs.

In this context, community members are expected to make important decisions that either embrace or resist these outside influences. By identifying the characteristics that make their community special and how these can be protected or enhanced, residents can equip themselves to steer change rather than simply cope with it. In doing so, they are crafting a positive message about the future that says, "We know who we are. We know what's great about this place. We know what we want our future to be." Ultimately, residents want their community to be a great place to live, to visit, and to start a business.

The more a community does to enhance its distinctive identity, the more reasons there are to **visit and invest** there.

» Ed McMahon, Orton Trustee and Senior Fellow at the Urban Land Institute



The best way to identify a community's distinctive character—and find the means to protect it—is to listen to and work closely with the people who live in the community. When residents get involved, they begin to see themselves and their personal stories as part of a larger community story. They also begin to see themselves as the creators of that larger story. They become invested in how the story turns out, and this investment translates into a heightened ability to shape change and prepare for the future.

The Orton Family Foundation believes that every town has a heart and soul, that the residents of each town are the only people who can tell you what it is, and that those same residents are the people who must work together to strengthen it. The Foundation has named its approach *Community Heart & Soul* for the special characteristics that make each community unique, as well as for the deep commitment that residents feel and show for where they live.

This Field Guide explains how you can work with residents to understand a community's heart and soul, make decisions about how to strengthen it, and in the process create a more resilient community.

Heart & Soul

PRINCIPLES

The big idea behind Community Heart & Soul is to help small cities and towns succeed by identifying and strengthening those characteristics that matter most to the people who live there.

Community members must be deeply involved in this effort, which lets them connect with each other and the places and customs they care about. These connections lead to commitment and

action, and the community builds resilience through the practice of working together and learning new skills.



The Community Heart & Soul approach is founded on three basic principles: involve everyone, focus on what matters, and play the long game.



Involve Everyone

Community Heart & Soul emphasizes the wisdom that can be found in local experience and diverse perspectives. The Heart & Soul approach calls for hearing all voices in the community, not just property owners or voters, so it deliberately seeks to have all groups represented in the process. This means that the Heart & Soul process connects with, listens to, and includes everyone who lives, works, learns, or plays in the community, including those who are hard to reach or underrepresented.

To do this in a meaningful way, Heart & Soul encourages dialogue and an exchange of ideas. The conversation is made as accessible and relevant as possible so that people are able and willing to participate. To do this effectively, Heart & Soul introduces new tools and ideas such as the use of *community values* and *stories* to help different groups find common ground and have more productive conversations.

Heart & Soul emphasizes the need to work together in order to get things done. No small town government, local non-profit, service club, wealthy donor, or super-volunteer can build or maintain a great community alone. Heart & Soul finds common ground among residents, promotes communication, and builds collaborative skills so that everyone knows where they are headed and can pull the wagon together.

The results of our Heart & Soul work have **exceeded our expectations** in the number and diversity of people participating and the quality of information received.

» *Jacob Smith, former Mayor, Golden, CO*



Focus On What Matters

Heart & Soul brings people together around a common cause by identifying the shared interests and values of community members. *Community values* represent what is most important to residents and include those things that distinguish a community or make it a good place to live. By having conversations about these values, participants can immediately relate to things they

care about most and better understand how decisions they make will affect those things. Best of all, participants who care about the result of a decision will stay involved as action is taken.

Heart & Soul uses community values to understand issues and identify and prioritize actions. Instead of creating blue-sky visions or impossibly long

wish lists, Heart & Soul helps residents identify and select actions that will have the best impact on the things that they care about. It then matches those actions to the abilities and resources of local organizations. Since Heart & Soul invites everyone into the process, chosen actions are quickly recognized as homegrown ideas that community members will support.

Through Heart & Soul we are finding common ground. Instead of being concerned about our differences, **we are moving toward the things we meet on....** The growth is going to be beautiful.

» Annie Cooper, *Community Volunteer, Essex, VT*



Play the Long Game

Heart & Soul is focused on long-term success. To ensure that plans or ideas don't just sit on the shelf, Heart & Soul focuses heavily on building ownership for and commitment to the results.

This means that current and potential leaders and any organizations or departments responsible for following through on plans and ideas are engaged throughout the process, especially in making decisions.

The Community Heart & Soul process cultivates a permanent shift toward more effective and participatory decision making. Heart & Soul anticipates this shift by including leadership development and skill building in each activity.

The process expands the talent pool by constantly seeking to bring in new participants, especially young people and underrepresented groups.

Heart & Soul also strengthens the social fabric of a community by making connections between different groups of people and forging new personal relationships. The Heart & Soul process helps to create a leadership structure that will steward the community's values, and seeks permanent commitment from local government to open and participatory decision making.

The fabric of a community is built by its volunteers. By placing volunteers front and center, the Heart & Soul process has helped to weave the fabric of our community.

» Mike Bestor, City Manager, Golden, CO

How To Use This **FIELD GUIDE**

What is the Community Heart & Soul™ Field Guide?

This Field Guide distills twenty years of experience working with small cities and towns into a **step-by-step process and kit of resources** designed to equip local leaders, staff, and volunteers with everything they need to design and deliver the Heart & Soul method in their community.

Take some time to read the opening pages that describe Community Heart & Soul's philosophy and beliefs. Community Heart & Soul's lasting benefits rest on our three Principles—**Involve Everyone, Focus on What Matters, and Play the Long Game.** Abiding by them in your Heart & Soul

process **will yield profound and lasting results.**

This Field Guide presents the 4 phases, dozen steps (3 in each phase), and multiple tasks, activities, and best practices that comprise the Heart & Soul method. Each phase and step is described in detail. This Guide features “On the Ground” sidebars, **inspiring stories of challenges, successes, and results** from the towns where we've worked; glimpses of how Community Heart & Soul can strengthen your town.

This Guide is **a road map to first deeply understanding your town**

and then planning for a future shaped by the shared values of its residents. As with a roadmap, it is important to begin at the beginning and follow through the phases in sequence to arrive at the best possible destination. As you read the Guide, you will find numerous links to additional resources, some developed by the Foundation, others by nonprofits and foundations with which we collaborate. Clicking on these links will **take you to a deeper level of detail.** The Foundation continues to develop and publish field-tested resources and tools, so make regular return visits to find the latest.

Who Can Use this Field Guide?

This Field Guide is written to encourage **residents to lead the process** in partnership with local elected leaders and town staff. It will serve community volunteers in small cities and towns as well as elected officials (city council and selectboard mem-

bers); planners and planning commissioners; volunteer groups and civic organizations; economic development, planning, land-use, and resource consultants; and non-profit organizations. The Heart & Soul Principles underline the importance of a **resident-driven**

effort, and that means volunteers. It also means **partnering with others.** In many circumstances, organizations that serve the community in different ways come together as a team to deliver Community Heart & Soul.

When can the Heart & Soul process be used?

The Community Heart & Soul process can build the foundations of **a range of different community decisions, and outcomes,** including comprehensive planning, area master plans,

economic development plans, land use policies, visioning and action planning for civic groups and non-profits, and strategic plans.

Are you wondering whether your community will benefit by using Community Heart & Soul? The answer is a definite “Yes”!



ON THE GROUND

BLOCK PARTIES ROCK!

The Heart & Soul team in Golden, Colorado, wanting to bring new voices to the table, chucked the table.

Instead, they began hosting neighborhood block parties across the city to start informal conversations and help neighbors get to know each other.

Creating block parties didn't come easily, though. The City of Golden had no process for approving party proposals. After realizing the power of block parties to bring neighbors together, the City created a Block Party Application Packet to encourage residents to host their own parties in following years. To sweeten the deal, the City offered funding for events through its i-Neighborhood grant program.

Think your city or town needs a few more parties? Consider adapting Golden's application packet for your own community. [📄 Download the pdf.](#)

Heart & Soul

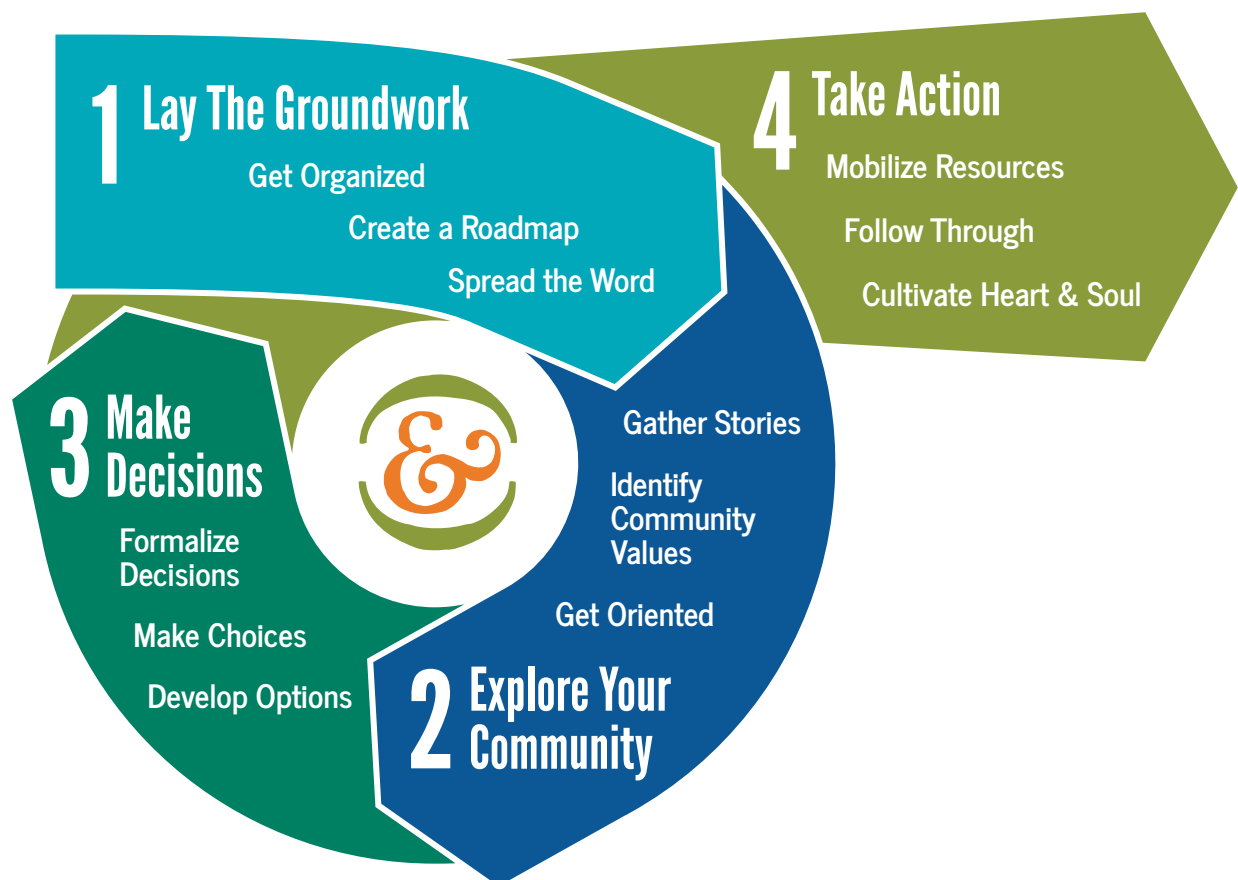
STEP-BY-STEP

If you are working in your community and initiating a new process, you can use this guide to structure your approach to community outreach, participation, and decision making. The Heart & Soul process described here begins with the earliest stages of

project development. It then moves into start-up activities such as project design and partnership development. From there, it walks all the way through to choosing actions and following through for success over the long term.

The whole process is outlined in 12 steps, each with a short list of specific tasks. The steps are organized into four phases that lead to specific milestones.

The four phases of the framework are illustrated here and explained in detail on the following pages.



Phase 1: **Lay the Groundwork**

Laying the groundwork is about getting organized to conduct a successful Heart & Soul process.

This is when you gather partners and a team of volunteers, figure out how they will coordinate with each other, set goals, and establish what will be included in the process. It is also an important time to find out who lives or works in the community and set up a communications strategy to reach them.

Phase 2: **Explore Your Community**

Explore Your Community is the heart and soul of the Heart & Soul approach.

It is about discovering what your community cares about—its shared values—and building a vision for the future based on those shared values. Activities in this phase focus on bringing a broad mix of people into the process to help identify these values. Telling personal stories about local experiences is a key engagement strategy in this phase, bringing people together and helping them to find common ground.

Phase 3: **Make Decisions**

Making decisions is about figuring out how to protect and enhance your community's values and how to build toward a future that honors them.

What are the options available to your community and which should be pursued? Also important to the decision-making process is figuring out when things will be done. What will you do this year and what will you work on later?

Phase 4: **Take Action**

Taking action is about following through with the action plan and doing the work needed to produce results.

A particularly important action is to create a stewardship team that will keep watch on how the other actions are progressing. This leadership team coordinates the work and communicates progress to keep community members engaged and decision-makers accountable. This team also looks for ways to infuse civic culture and any community decision-making process with the principles of Heart & Soul.



SUPPORTING RESOURCES (guides, websites, online tools and calculators, and more) are available on the Orton Family Foundation's website. [Visit **www.orton.org/resources**](https://www.orton.org/resources)

Phase 1



LAY THE GROUNDWORK

Laying the groundwork is about getting organized to conduct a successful Heart & Soul process. This is when you gather partners and a team of volunteers, figure out how they will coordinate with each other, set goals, and establish what will be included in the process. It is also an important time to find out who lives or works in the community and set up a communications strategy to reach them.

Phase 1 includes three steps:



Get Organized

This is when you assemble a team, size up your community's strengths and weaknesses, and set goals. Take this step seriously. Each of its tasks plays an enormous role in the overall success of your Heart & Soul project.



Create a Roadmap

A roadmap, or project work plan, is a basic requirement for good project management, and it also works as a communication tool that helps people understand what will happen when. The roadmap should include specific activities and tasks, timing, and budget.



Spread the Word

This step is about building public awareness, interest, and good will for your Heart & Soul project. Community members will want to know about the Heart & Soul principles and the particular details of the project. Before you start getting the good word out, assemble all the tools, information, and people-power required to support communications.

Phase 1 CHECKLIST

A well-organized Heart & Soul process will have the following elements in place by the end of Phase 1:

- ❑ A core whose members reflect the diversity of community demographics, neighborhoods, local organizations and businesses, and political views
- ❑ Volunteers, coordinator, staff or contractors ready to perform tasks such as project management and coordination, volunteer management, communications and outreach, event planning, facilitation, website and social media management, and financial oversight
- ❑ Clear goals that can be explained or understood by everyone
- ❑ An analysis of community social networks, to help your team be more effective in communications and outreach
- ❑ An engagement strategy that outlines activities and timing (include clear tactics for including youth, marginalized voices, busy people, minorities, and the elderly)
- ❑ A communications strategy specifying outreach channels, audiences, and timing
- ❑ Ready-to-go communications tools such as branding and messaging, and website and social media identities
- ❑ A work plan that details overall tasks, schedules, responsibilities, and budget allocations
- ❑ One or more good-will-building, awareness-raising activities such as a public "kickoff" event, a round of introductory presentations with local organizations, or a public art campaign

STEP 1

Get Organized

This is when you assemble a team, size up your community's strengths and weaknesses, and set goals. Take this step seriously. Each of its tasks plays an enormous role in the overall success of your Heart & Soul project.

Step 1 includes five tasks:

- 1.1 Form a core team
- 1.2 Assess community readiness
- 1.3 Scope out the process
- 1.4 Expand the team
- 1.5 Understand community networks

TASK 1.1

Form a core team

Assemble a core team of pioneers who are excited about the work and have some capacity to support it. This could be staff from town government, from local organizations, an existing committee, or your friends and neighbors. This team plays several key roles, such as shaping and monitoring the process, connecting with local stakeholders and leaders, and navigating various roadblocks. It may include organizational partners that supply or find funds, staff, and other resources. It also includes volunteers who are simply eager to be involved.

It is smart to include people who have established relationships and bring strategic benefits to the project, such as a local elected official or a leader from a local civic organization. Representatives from local businesses, community leaders, municipal staff, and people with relevant community experience add value to the team and help ensure success. Individuals or organizations with skills in project management, budgeting, event planning, communications, facilitation, and local politics are critical. It is also helpful to find leadership from less established quarters, such as local youth, sports and activity clubs, or individuals who are well connected to certain marginalized or informal networks you need to reach. Finally, find an organization that can house staff or contractors and manage finances—the sooner you recruit such an organization the better.

TASK 1.2

Assess community readiness

Take some time with your team to understand how ready your community is to conduct a Heart & Soul process. Some communities can dive right into the work of Phase 2 to explore their communities, but others will need to focus more heavily on building leadership, trust, relationships, and skills before they can enter the next phase of the process.

Readiness involves a combination of community interest and competency. Community interest relates to how much anyone cares about what you are trying to do. Is there an acute need or a big decision that needs to be tackled? Is there a desire for collaborative action that the Heart & Soul process will tap into?

Community competency relates to the social and civic factors that can slow down or speed up the process. These factors include:

1. **Leadership.** A community with robust leadership embraces formal and informal leaders, including youth. Leaders are trusted, responsive, and accessible. They encourage community participation, and they are able to build relationships and enable action. Focus on building new leadership and equipping existing leaders with opportunities to connect with residents.
2. **Relationships and community building.** A community with strong relationships between individuals and organizations has experience with collaboration and is well equipped for this work. Focus on bringing different types of groups together, coordinating between organizations, and giving everyone an opportunity to connect by sharing experiences of living in the community.
3. **Civic participation.** A community with an ethic of civic participation and the skills to include people from diverse cultural, economic, and political perspectives provides many opportunities for people to participate in making meaningful decisions. Demonstrate the benefits of civic participation throughout the process by bringing local staff and leaders to events, providing them with ongoing updates, and giving them participant feedback that will make them more confident in making decisions.



ON THE GROUND

TEENS TAKE THE LEAD

Think you know what teens in your town want? Try surveying them.

A survey of high school students in Cortez, Colorado revealed surprising results—more than 50 of the 400 teens surveyed wanted to get involved in decision making about their city's future. Cortez Heart & Soul saw an opportunity for youth participation and quickly organized a series of youth-adult partnership trainings and events with various City of Cortez boards and committees. The events assisted youth to learn skills for serving on committees and connecting with local civic leaders. Here's just one result of many: Cortez's City Council created two permanent seats for teens, with full voting rights, on the City's Parks and Recreation Advisory Board.

Tom Butler, Cortez City Councilor and Heart & Soul team member, recalls: "When we started talking to these kids we found out how interested they are in the future of Cortez, and that they have great ideas. We're all concerned about the exodus of youth from our small towns, so getting them involved in local governance, listening to them, and having them help make decisions based on what matters to them is a great way to build our future."

Ready to engage youth on your committee or board? Start with *Authentic Youth Engagement: A Guide for Municipal Leaders from the National League of Cities*. [Download the pdf](#)

The Heart & Soul process fortifies each of these factors, so this task is simply about understanding where to begin and what to focus on. In other words, you will consider your community's strengths and weaknesses in each area and then design a process that addresses the gaps. If your town is typically unable to do more than respond to crises and fill short term needs, for example, then your process might begin with a focus on relationship building and small, tangible successes. On the other hand, if your town has a solid record of working together toward long-term results, you might be able to dive more quickly into exploring shared community values that will inform important decisions.

TASK 1.3

Scope out the process

Describe the need that your specific process is addressing, as well as its goals and intended results. Be as specific and clear as possible and write these in a way that is easily understood. This is the first communications piece of the project.

Fundraising and gaining approvals are very common start-up tasks. While you are developing the scope of the process—everything that your project will include—you can also be preparing a proposal for grants or other "sales pitches" that may be required by city council, a non-profit board, or your family, for example.

Have the core team develop or review the proposal. A simple way to do this is to ask the team to consider the following questions and have them keep what they learned from the readiness assessment from Task 1.2: Assess community readiness in mind.

- 1. What is the need?** What are the community challenges or opportunities that the project will address?
- 2. What are our goals or expectations for success?** What will we accomplish through this process? Are there specific deliverables? What are the short-term and long-term results?
- 3. What is the scope?** Is there a geographic area of focus, or a topic of focus? Is there a clear timeline? Are there issues that are "off the table"?
- 4. Why Heart & Soul?** How will this process differ from previous community projects?

In establishing goals, avoid proposing specific solutions or taking positions, such as saying "No" to a pig farm or "Yes" to repairing the potholes on Main Street. Heart & Soul is about building a sense of shared purpose and organizing a response to it, which could reveal unanticipated solutions. Heart & Soul is also about finding and working toward common goals rather than taking sides or reinforcing a position.

For now, put the word "Draft" on this proposal. These goals and expectations are helpful for fundraising and for recruiting people into the process, but the new people you are trying to engage should have a chance to discuss the goals and shape the process.

TASK 1.4

Expand the team



OUR SELECTING A HEART & SOUL COORDINATOR AND FORMING YOUR HEART & SOUL TEAM WILL HELP YOU WITH THIS TASK.

Heart & Soul requires a broad base of committed volunteers and advisors, typically more than the original core team provides. Be inclusive and strategic when expanding this team by thinking about the skills the team needs, the right personalities to balance or energize the group, and who can connect you to the people you want to reach. This is the time to bring in youth, community leaders, key staff from local organizations, members of civic groups and local committees, representatives from local churches, and representatives from specific demographic groups and geographic areas.

Make sure that everyone involved in the process knows what he or she is signing up for. A great way to do this is to write up formal descriptions of everyone's roles and responsibilities, sign contracts—especially if there is money involved, and include some procedural agreements such as how decisions will be made and how transitions will be handled.

The Heart & Soul team typically includes:

- 1. Partners.** Partners usually commit staff, funds, or other resources to the project. They include such entities as the town or city government, local or regional non-profit and for-profit organizations, service agencies, and youth-focused organizations. Define clear roles and responsibilities for each partner and formalize them in a partnership agreement.

2. Community volunteers and advisors.

Members of this representative group include advisors and active volunteers. They are the eyes and ears of the effort, acting as ambassadors to the broader community and to specific groups and networks. They contribute their perspectives, local experience, and special skills to point the project in the right direction. In many instances, individuals in this group attend community gatherings and help facilitate discussions.

3. Task forces. These are smaller groups of volunteers that take on special assignments. Task forces meet frequently to coordinate and follow through on specific tasks such as youth outreach, communications, policy or plan development, and fundraising. Task forces typically disband when a task is completed.

4. Coordinator. A qualified, paid project coordinator is the hub of the effort. Coordinators manage volunteers, handle administrative tasks, and keep everything on track. A coordinator needs experience with project management, coordinating volunteers, facilitating meetings and discussions, community organizing, firefighting and juggling. A coordinator ought to be at once forceful and patient—and have a sense of humor.

TASK 1.5

Understand community networks



OUR COMMUNITY NETWORK ANALYSIS TOOL WILL HELP YOU WITH THIS TASK.

Networks are groups of people who associate with each other and share information. Tapping into these networks in your community is the best way to broadcast information and engage with residents. Networks can be formal (Rotary, conservation commission, churches) and informal (a seniors' exercise class, food bank customers, bingo enthusiasts, ESL (English as a second language) students). Since one of the project team's most important tasks is to engage people in the community, accessing these networks must be embedded in your engagement strategy [Task 2.2: Design an engagement strategy] and communication strategy [Task 3.1: Design a communications strategy].

Spend time identifying these networks and how to connect with them. Think as far beyond the usual suspects as you can, and remember that diverse perspectives lead to stronger and more credible solutions. Diverse perspectives

can be obtained by engaging with people who are young and old, from various cultural backgrounds, of differing political inclinations, from a broad range of economic situations, and from different neighborhoods or areas within the community. A demographic analysis [see Community Network Analysis tool] can help your team discover who is in your community and set goals for engaging them.

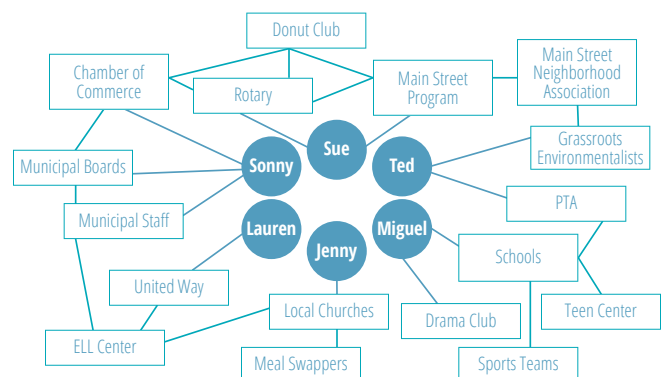
Go a bit further and expand your awareness of community members within demographic sectors, such as:

- Young families (offer these parents child care so they can attend events)
- Business owners (get a list from the Chamber of Commerce, and don't forget Ray's Auto Body out on Route 5)
- Teens (from the high school, the vocational school, and the teen center)
- Working folks (nurses, mechanics, teachers, wait staff, and anyone making a wage)
- Farmers and ranchers (you might find them drinking morning coffee at the grain elevator or feed store)

Connections may be through a *place* (local breakfast cafe, Rod & Gun Club, corner market), a *person* (Walter, the Town Clerk), or a *moment* (Green Drinks happy hour, Firefighters' BBQ, soup kitchen lunches, Chamber mixer). You will probably find that some connections help the team reach a large number of residents, while other connections lead to a specific group that is perhaps difficult yet very important to reach.

Use what you learn about your community's networks will allow you to develop engagement and communications plans that connect you to many more community members. Be sure to evaluate your team's depth of reach into the community and whether it's been as inclusive and diverse as you had hoped.

FIGURE 1: EXAMPLE NETWORK MAP





ON THE GROUND

PARTICIPATION BEYOND THE USUAL SUSPECTS

It's easy to peg low turnout at a public meeting to apathy, or assume that you always see the "usual suspects" because no one else has time or interest. Check those assumptions at the door if you want real participation.

In Cortez, Colorado, the Heart & Soul team knew that Native Americans on a nearby reservation were typically underrepresented at public meetings. The team met with members of the Ute Mountain Ute and learned the best ways to reach members of the tribal nation: door-to-door outreach, letters of invitation, and using the tribe's radio station to spread the word. After overcoming fears and assumptions about their neighbors, and learning the best ways to seek participation, the Heart & Soul team hosted meetings with additional members of the tribal nation, thereby strengthening relationships and beginning to build trust. When it came time for a downtown Cortez beautification project, the Ute Mountain Ute provided direct input on the plans and partnered with the City to incorporate aspects of tribal culture and history into improvements at the visitor's center.

Learn strategies for reaching all groups of people in your community by listening to the CommunityMatters conference call recording on Engaging Diversity with Mónica Palmquist Velázquez of Cortez. [🔊 Listen online.](#)

STEP 2

Create a Roadmap

A roadmap, or project work plan, is a basic requirement for good project management, and it also works as a communication tool that helps people understand what will happen when. The roadmap should include specific activities and tasks, timing, and budget.

Step 2 includes three tasks:

- 2.1 Refine the proposal
- 2.2 Design an engagement strategy
- 2.3 Create a work plan and budget

TASK 2.1

Refine the proposal

Your expanded team of volunteers is more likely to care about and commit to the effort if they have a chance to shape the project and make it their own, so review the project scope and goals with the team and make sure these are on target. It may be necessary, for example, to tweak the goals and results so that organizational partners can align the Heart & Soul process with their own mission or programs. Your advisors' insight might lead to clearer or more specific goals, or help distinguish the project from some other effort.

The second reason is to respond to what you may have learned about existing resources or constraints. Do an inventory of other local projects that have been completed or are underway. You may discover that your Heart & Soul effort could build on results from past projects, piggyback on an existing one, or even add value to other projects currently underway by strengthening their community engagement. Similarly, you may have learned that the local government or other key players are more resistant to your ideas than expected. In that case, the goals of your process may need to focus more on collaboration and building alliances.

TASK 2.2

Design an engagement strategy

A community engagement strategy spells out specific activities that the team conducts in order to involve residents, promote discussion, gather feedback, and share in making decisions. There are a host of engagement techniques ranging from high tech to low tech, fun to meaningful, and creative to practical. The activities you choose depend on your team's abilities, the information you hope to glean, or the results you hope to achieve in each phase of the Heart & Soul process.

Heart & Soul is about community engagement. It's about **reaching out to the community** and trying to get the voices of those who don't normally participate in the public process.

—Shane Hale, City Manager, Cortez, CO

Successful public engagement requires that people participate, of course, so be creative and thoughtful about the timing, location, publicity, and format of each activity to make participation easy. Do not, for example, schedule a gathering during hunting season or on the sixth floor of a building with no elevator! Similarly, do not put a survey online without a plan to steer people to the web address—they can't participate if they don't know about it or don't know where to find it.

When imagining a public engagement effort, it is critical to understand that it is not enough to simply deliver information or to get feedback on a preconceived idea. Good engagement asks participants to help develop the information and generate the ideas. It is not acceptable to ask for people's input and then do nothing with it. Meaningful engagement uses participant's ideas and feedback to better understand issues, clarify priorities, and evaluate options.

Whether you are working toward an action plan, a decision about a specific issue, a town plan, or some other policy, the right sequence of activities will be the one that leads your team and your community along a path to reach the desired result. A well-designed sequence of activities enables community participants and your team to (in this order):

1. Identify community values
2. Understand concerns, issues, and trends
3. Set goals and targets
4. Identify ideas for action, or potential solutions to a problem
5. Clarify and refine options, alternatives, and trade-offs between the ideas or solutions
6. Select or prioritize options
7. Formalize decisions and create an action plan.

A well-designed sequence of activities also encourages people and organizations to build new connections with each other and develop new skills, which prepare your team and the broader community to take action.

TASK 2.3

Create a work plan and budget

The final details in mapping out the process are to allocate budgets, figure out the timing, and create a work plan that includes preparing for and processing the results of each activity. Be sure that the work plan spells out the what, why, when, where, who, and how much for each task.

This activity requires a bit of back-and-forth between overall process design and communications planning. Many project planners will start by designing grand engagement strategies with all the bells and whistles, but realize later that the budget can't afford it. The budget must be spread across all phases very carefully to support the whole project.

Activities must also be carefully spread out. Allow time in between big events, usually two to three months, to process feedback, do research and develop new materials. Coordinate activities with other community events and activities such as summer festivals, holidays, and elections. [Figure 2: Gardiner, Maine Heart & Soul Timeline]

Finally, don't overlook the small stuff. There is just as much work behind the scenes as there is in running events and outreach activities. Regular email blasts and website updates, processing feedback and documenting meetings, and maintaining healthy relationships takes time and energy. Hard research may be required in order to bring specific information into a discussion.



ON THE GROUND

LOCAL SKILL BUILDING

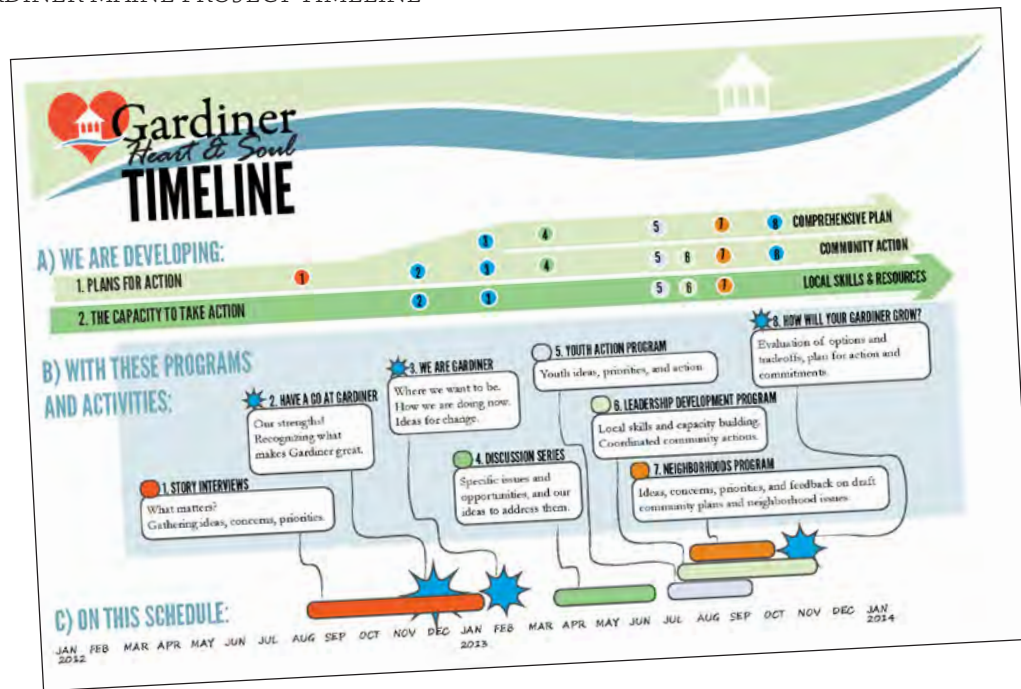
Interested in making your Heart & Soul efforts truly local?

Train local volunteers to help facilitate meetings.

In Biddeford, Maine, the Heart & Soul team partnered with Everyday Democracy to offer a facilitator workshop to build volunteers' skills. The workshop trained more than 35 residents as facilitators, including high school and University of New England students. These volunteer facilitators supported 16 neighborhood meetings across the city. They can continue to volunteer their newfound skills at any future gatherings where key community decisions are discussed. [Visit everyday-democracy.org](https://www.everyday-democracy.org).

Some decision points may require formal procedures, such as a council vote or a referendum at a town meeting. Try to anticipate these as much as possible and write them as tasks or milestones in your work plan.

FIGURE 2: GARDINER MAINE PROJECT TIMELINE



STEP 3

Spread the Word

This step is about building public awareness, interest, and good will for your Heart & Soul project. Community members will want to know about the Heart & Soul principles and the particular details of the project. Before you start getting the good word out, assemble all the tools, information, and people-power required to support communications.

Step 3 includes three tasks:

- 3.1 Develop a communications strategy
- 3.2 Prepare communication tools and materials
- 3.3 Build an audience

TASK 3.1

Develop a communications strategy

Community engagement and participation is only successful if people know when to show up, why they should bother, and that their participation has an impact. The Heart & Soul process needs a communication strategy

and a designated team of staff or volunteers to carry it out. Successful communication requires a combination of skills in community organizing, writing, graphic design, website and social media development, and managing email and address lists. It requires skill in multiple languages, where necessary, and an understanding of culturally appropriate communication methods.

A communications strategy has four basic parts:

1. **Brand.** A brand includes a name, and often an image, that allows people to recognize a product as belonging to a larger effort. A catchy project name, logo, and graphic personality help to easily identify your Heart & Soul project. When people see it they know that the flyer, ad, event, or document is connected to the project. Branding the project can be as simple as always using the name of the project in the same fancy or striking font.
2. **Messages.** These are simple talking points that explain the process in various ways. Team members need to be able to explain the process in the time it takes to get through a grocery store checkout line. A few simple messages must convey why Heart & Soul is important, and such messages should be tailored to fit the audience. For example, be sure to let the local merchants on Main Street know how the project can be of benefit to their businesses.

Other messages include communicating who is involved, who is paying for it, and how people can participate. Such messages are helpful for each specific activity or event when your team is recruiting participants.

Practicing a “checkout-line speech” is a great activity for a team meeting. [Figure 4] Have team members practice their answers with each other, and be sure to do some role-playing. What would you say if you were talking to a high school student, an elder, or a rancher? Would you say something different to each? Roll your grocery cart up to the checkout line to see why practicing is important....

3. Distribution outlets. These are places for getting the word out, such as local papers and radio stations, websites, email lists, hang-outs around town, bingo nights, the post office (direct mailings are pricey but effective), and the tax bill (which can often include

notices or flyers). Make a list of these opportunities and figure out how to use to them. For example, what are the deadlines for placing a notice in the paper, and who is the right person to contact at the radio station? Using existing outlets is always easier than inventing new ones.

4. Messengers. Finally, remember that some messengers are better suited to certain messages or certain audiences. Your community network analysis (Task 1.5: Understand community networks) will have identified key people who can connect your message to specific audiences. A good friend or trusted colleague is often the only person who can persuade a potential volunteer to participate. Your team is a team of messengers, and they all have at least one friend who is well connected to an audience you need to reach. Make it clear to them that this is part of their job, and also make it clear what the message is.

FIGURE 3: BRANDING EXAMPLES



FIGURE 4: EXAMPLE 'CHECK-OUT LINE SPEECH'

<i>Team member with no practiced messages:</i>	<i>Team member with a ready-to-go message:</i>
<p>Mayor of Town: Hi Norm, what’s this Heart & Soul thing all about, anyway?</p>	<p>Mayor of Town: Hi Norm, what’s this Heart & Soul thing all about, anyway?</p>
<p>Team member named Norm: Well, we’re getting together with people and talking about stuff that’s going on in our community. You know, economic development, fire code number 43.1, and all those PPLRDPRTs. And we think if everyone gets together and if it’s successful, then we could have a downtown master plan or some kind of way to talk about the future, you know?</p>	<p>Team member named Norm: We’re trying to understand what is most important to people about our community, and what we can do to make those things even better in the future.</p>
<p>Mayor of Town: Hey, is that cheese on sale? See you later!</p>	<p>Mayor of Town: Wow, can I do anything to support that vital work?</p> <p>Team member named Norm: Yes, you could join our team as an advisor, and we’d love to hear your thoughts on how to get the city council more involved.</p>

TASK 3.2

Prepare communication tools and materials

Before the your Heart & Soul process goes live, take the time to prepare basic communication materials and the means to manage and deliver them. The following lists are a good place to start.

General communication support:

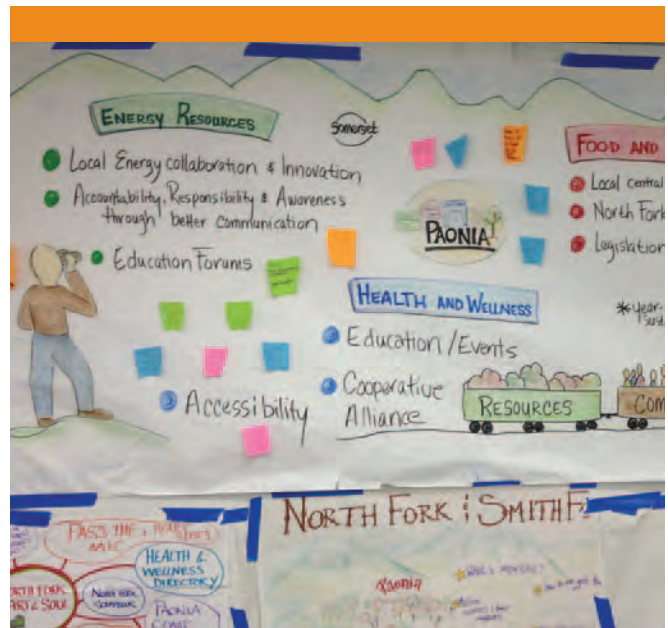
- A communications task force of dedicated volunteers, or a professional communications person
- Translators, if necessary
- Volunteers tasked with taking meeting notes, writing activity and event summaries, and posting these to the website
- Volunteers assigned to spread the word to specific networks and audiences
- A website for announcements, record keeping, and public access to records
- An online presence (website, social media profiles) that provides regularly updated information and interactive content
- A way to manage contact information for hundreds of people (normal email services are ill-equipped for this; try a list server or a contact management system)
- A way to collect contact information (website sign-up button, event sign-in sheets)

Pre-launch communications materials:

- Brand and message
- Templates for newsletters, flyers, and posters
- FAQs (frequently asked questions) and their answers
- Talking points for volunteers
- Process map or timeline as a simple diagram that conveys the major project steps

Materials needed throughout the project:

- Summary reports from activities
- The team's meeting notes
- Press releases and articles
- Advertisements (flyers, posters, mailers, newspaper ads) to promote events
- Presentations to provide project updates to clubs, committees, elected officials, and others
- Newsletters (printed or digital)



ON THE GROUND

MAKING THE PROCESS VISIBLE

Tired of changing deadlines and priorities?

Hold your team accountable with a visible project wall.

North Fork Valley Heart & Soul in Colorado dedicated a wall to deadlines, milestones, and information. Not only did the wall keep team members on track, it also provided a visual way to explain the process to new volunteers and other community members. North Fork Valley includes the towns of Paonia, Hotchkiss, and Crawford.

TASK 3.3

Build an audience

This task is about building awareness, interest, and good will for your efforts by making a positive first impression. Residents need to hear about the process, understand how it can benefit the community and themselves, experience what it is like to be engaged in a meaningful way, and, as a result, be eager to continue to participate. One of the most important results of Phase 1 is to have well-informed, engaged community members.

There are “soft-launch” and “hard-launch” approaches to building an audience. A successful approach, especially for organizations that are new to community engagement, is to start with easier and less risky soft-launch activities, then follow up with a hard-launch activity to kick off the project.

Examples of soft-launch activities include:

- Going to regular gatherings of social and service clubs, the local government, and non-profit committees and making a pitch for the project. Give them reasons to care and show them how Heart & Soul will benefit their work
- Getting a table or booth at local festivals, farmers’ and craft markets and set up an information station with some creative activities
- Organizing volunteers to meet with people one on one, promote this important work, ask questions, and listen
- Persuading a local establishment to host a “Heart & Soul Happy Hour”
- Entering the 4th of July or Mardi Gras parade
- Starting a social media campaign

Hard-launch activities are usually big events such as a community forum or summit, a celebration, or a gathering of some kind. Such events combine good will and information-sharing activities along with more relationship-building activities such as discussion groups. These events are expensive either in terms of time or money, so use a big kickoff event to also begin Phase 2: Explore Your Community by gathering input from the community.



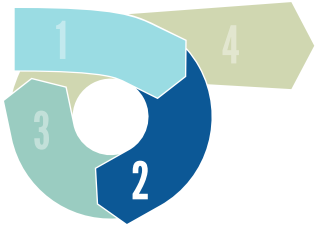
ON THE GROUND TAKE THE PROCESS TO THE... BREW PUB

Have you tried every engagement trick in the book but still aren't attracting some folks?

Take a page from the North Fork Valley Heart & Soul team's playbook and bring the process to the people by heading to a local watering hole. They partnered with Revolution Brewing Company to create Lovett-or-Leave-It IPA and unveil the new brew at the Heart & Soul Brew-Ha-Ha event. To get input on community values, folks were asked to write their ideas for building a healthy and prosperous community on the back of bar coasters. More than 70 people gave their two cents (and downed a pint or two) at the event.

Phase 2

EXPLORE YOUR COMMUNITY



Explore Your Community is the heart and soul of the Heart & Soul approach. It is about discovering what your community cares about—its shared values—and building a vision for the future based on those shared values.

Activities in this phase focus on bringing a broad mix of people into the process to help identify these community values. Telling personal stories about local experiences is a key engagement strategy in this phase, bringing people together and helping them to find common ground.

The power of learning what so many people care about cannot be overestimated. It forges new relationships, bridges divides, builds trust, sparks novel solutions, uncovers new leaders, and starts new partnerships. Most important, it brings shared community values to light, revealed in the

places and characteristics that set your town apart from every other town.

Explore Your Community is about discovering and describing shared community values and then developing a blueprint for the future based on those values. How do you discover and describe these values? Having folks tell their personal stories about local experiences and beloved places is a great way to get people interested in this activity and is a great starting point.

Phase 2 includes three steps:



Gather Stories

Before you start throwing around ideas or crunching data, take some time to simply hear what people have to say about their community and what questions they might raise. In this step, stories are gathered from a broad range of community members. This very intentional and active listening helps you discover what is important to people, what they value, and what they are concerned about, which sets your Heart & Soul work off on the right track—as open, inclusive, and worthy of trust.



Identify Community Values

This is the cornerstone of Community Heart & Soul. In this step the Heart & Soul team and community members compile the stories and harvest information and data about what matters most, from which they develop a set of community values. These values provide the starting point for discussing issues, opportunities, and ideas for the future of the community.



Get Oriented

Put the community values in context by examining the ways that each value has been strengthened or eroded over time, whether they are getting better or worse, and setting goals for how they could improve in the future.

Phase 2 CHECKLIST

A well-organized Heart & Soul process will have the following elements in place by the end of Phase 2:

- ❑ Statements of the community's shared values that have been informed and confirmed by a broad cross-section of the community

- ❑ Goals that specify the community's aspirations

- ❑ An easily accessible record of the engagement process and activities, and community input provided through it

- ❑ A summary of specific ideas, concerns, and opportunities that can carry into Phase 3: Make Decisions

- ❑ An analysis that explores facts, trends, and drivers of change that affect your town's heart and soul

- ❑ Growing collaboration and understanding between local organizations, local government, and residents



ON THE GROUND

VALUE IN NEIGHBORHOOD CONVERSATIONS

Coming up with values shared by your whole community may seem like a daunting task.

Heart & Soul coordinators in Essex, Vermont chose a meeting-by-meeting approach to identify values with a broad cross-section of the community.

Starting with a series of 43 Neighborhood Conversations, the team engaged nearly 350 people in two-hour dialogues. The facilitated conversations were held at locations throughout town—local libraries, businesses, and even living rooms. Through these events, people who live and work in Essex expressed their thoughts on attributes of community life. Neighbors shared their desire for balanced growth, hope for improved infrastructure to increase safety, and feeling of pride in existing community assets. Following the events, one participant shared,

“It was wonderful connecting with my neighbors and discovering common goals for our community.”

STEP 4

Gather Stories

Before you start throwing around ideas or crunching data, take some time to simply hear what people have to say about their community and what questions they might raise. In this step, stories are gathered from a broad range of community members. This very intentional and active listening helps you discover what is important to people, what they value, and what they are concerned about, which sets your Heart & Soul work off on the right track—as open, inclusive, and worthy of trust.

Step 4 includes three tasks:

- 4.1 Listen and learn
- 4.2 Organize the data
- 4.3 Share the stories

A *story* can be just about anything—a memory, anecdote, description, or tale—that reveals what people care about in their community. It can be short or long, told in a whisper, written on a scrap of paper, shared on social media, or delivered by song.

Whatever form these personal stories take, there are a few nuts and bolts that make for a successful story-sharing campaign:

- **Assemble a team of volunteers.** Find people widely trusted among community members, especially those from underrepresented networks such as students and seniors, to shape and conduct story sharing. This team may need to test out its ideas with a pilot project. If possible, include a media-savvy person on the team.
- **Decide how to tell, hear, and share the stories.** To maximize the value of this approach, stories need to be told, heard, and shared as broadly as possible. Intentionally sharing stories between disconnected groups is a powerful way to build a bridge between them.

- **Prepare questions or prompts.** It is helpful if all the story-gathering volunteers use the same questions and prompts. These can be as simple as, “Why do you live here and why do you stay?” In some cases it can be helpful to use prompts such as a map or photographs of town and ask people to point at the place they are talking about.
- **Develop a system for collecting these stories.** Each story is rich with information that needs to be uncovered. Systematically collecting them by using the same questions or prompts, taking notes in the same way, or using a standard recording template allows your team to manage that information and use it to reveal critical insights. In some cases you might want one person to be the interviewer or group facilitator and a second person to be the note taker. If you are seeking specific conclusions from the stories, decide how to review and confirm these conclusions on the spot with the storyteller in order to avoid assumptions or biases.
- **Prep the team through practice and training.** Once the approach and methods are in place, it’s important to ensure that everyone is not only equipped to facilitate the conversations and capture the information but can do it well.
- **Consider the options for rebroadcasting the stories.** Capturing stories with audio, video, and photographs give the team an opportunity to tell a bigger story about the community. A short video, for example, is a useful communications piece that can quickly convey some of the essential values and priorities that were expressed by the storytellers. Remember to have people sign release forms.

A robust story-sharing process takes at least a few months, often longer. By the end of this process you will have a collection of insights, information, and preferences that paint a rich picture of the community. You will also have given people the opportunity to get to know each other better and be more familiar with each other’s perspectives. If you have recorded the stories with video, audio, and photographs, you also will have the elements of a powerful Heart & Soul communications piece.

TASK 4.1

Listen and learn

Sharing personal stories is a powerful way to find out what is important to people and forge new relationships at the same time. Listening to neighbors' stories reveals what connects people to their community, what they appreciate about it, and their hopes or concerns for the future.

During this key task the team harvests input from as many people in the community as possible. The key questions you want to answer are:

- What do residents appreciate or value about where they live?
- What things do residents want to stay the same?
- What things do residents want to change?
- What ideas do residents have for the future?

There are a number of straightforward ways to ask for and collect answers to these questions, such as in meetings or interviews, or through surveys or online discussions. By hearing each other's stories, community members find new reasons to connect, empathize, and relate to one another. They gain an appreciation for other perspectives where none may have existed before. Sharing stories is an easily approached activity, which can be done practically anywhere and anytime. It opens the door to those who are unlikely to participate in more traditional civic discussions.

One way to encourage someone to begin sharing stories is to ask a few questions and then listen really well. Ask someone: "What is important to you about this community?" One of your volunteers could interview five people on the street this way and would immediately learn new things about the community. Ten volunteers could quickly interview fifty people this way. Have a big dinner and invite people to share their stories around the table with their meal. Get a table at the fair and invite people to take a break and tell a tale.

Telling and listening to stories can be done in small groups during a big public event, one-on-one through interviews, with small groups gathering in someone's house, or individually through writing essays or audio recordings. Because different people are able to participate in different ways, the most inclusive strategy would involve multiple activities and methods. Whichever methods you use to ask these questions, design a community-wide conversation that allows everyone to both share and listen.



ON THE GROUND

KIDS BRIDGE DIVIDES

Colorado's North Fork Valley Heart & Soul team partnered with local radio station KVNF to create Pass the Mic, a youth-led story-sharing project to collect and share stories about local people from each of the valley's sometimes hostile economic sectors.

Over the course of two years, fourteen reporters (ages 10-12) were assigned to a local "beat" in one of North Fork Valley's five major economic sectors.

The youth reporters learned skills for creating multimedia stories and conducting interviews. Even more important, Pass the Mic helped the whole community start conversations about important issues like taxes, coal mine expansion, supporting local agriculture, and having people get along.

Want to see Pass the Mic in action?

[View videos and listen to interviews online.](#)

TASK 4.2

Organize the data

By reviewing the many stories and other forms of feedback that have been collected, your advisors and story gathering volunteers can discover a richly detailed community narrative that reveals nuanced information about a place that isn't usually possible in traditional public forums. This task is about harvesting and organizing that information.

Harvesting data from stories requires a dedicated team and a process that includes enough perspectives to validate the results. To avoid bias or misunderstanding, you need to either review and deconstruct the stories on the spot with the storyteller, or review the stories later with a diverse group of listeners.

Here are six details to look for in each story:

- Themes.** The themes of a story provide a way to organize the finer details that each story conveys. Story themes could include, for example, sense of community, an appreciation for nature, or feeling safe.
- Personal Benefits.** Stories often include an explanation about why the theme of the story is personally important to the storyteller. A strong sense of community, for example, makes the speaker feel supported and welcome. The speaker appreciates nature because getting outside helps her relax.
- Assets and Attributes.** Many people refer to specific places, events, or interactions that illustrate what they care about—good or bad. These are the more tangible details: the social, physical, or environmental attributes that reinforce or detract from what matters.
- Issues and Concerns.** It is often challenging to talk about a place without hearing about the day-to-day concerns such as parking problems, vacant lots, the lack of jobs, or unsafe streets. Record these issues and concerns and consider how they might reveal what is important to the person sharing the story.
- Goals.** Many people speak about their interest in the future, what they hope for or aspire to. Goals reflect a desired future rather than a specific action or project. For example, having safer streets is a goal, while installing speed bumps is a specific action. Goals can relate to a particular value or multiple values.
- Ideas.** You will very likely hear all kinds of action or project ideas—the need for a new playground, more parking, a grocery store, or a highway overpass. These may assist in figuring out what matters, so collect them in a master list of ideas that you'll return to when exploring options. Always be on the lookout for great, simple, feasible ideas that can be acted on immediately. Acting quickly on an idea is a great way to build confidence in the Heart & Soul approach.

FIGURE 5: EXAMPLE OF INFORMATION HARVESTED FROM AN INDIVIDUAL'S STORY

<i>Theme (indicates value area):</i>	SENSE OF COMMUNITY	CONNECTION TO NATURE	SAFETY
Personal benefits: <i>(Why this theme is important)</i>	Makes me feel like someone will help me if I need it	Enjoy outdoor recreation, chance to escape and relax	Feel safe going out and walking into town, kids are safe
Attributes: <i>(How this theme shows up on the ground)</i>	Knowing neighbors, community activities, public gathering places	Accessible public trails, scenic views, parks, forests	Sidewalks, street lights, community policing, looking out for each other
Issues/Concerns:	Apathy, divides, rancor	Weak subdivision policies, poor access to streams and forests	Recent crime, unlit streets or parks, speeding traffic
Goals:	New people are made to feel welcome, it is easy to volunteer	Everyone lives close to trail or park; the lakes and rivers have clean water	Crime is reduced, it is safe to walk to school
Ideas:	Neighborhood parties, ice cream socials, volunteer club	New trails, protect open spaces	More lighting, speed bumps, crosswalks, more visible police presence



ON THE GROUND

PUTTING STORIES TO WORK

Most everybody in your town has a story to tell, whether it's memories of a particular person or place or reminiscences of a time or event. Such stories can offer insight for a better future by revealing community values.

The Heart & Soul team in Damariscotta, Maine held Story Circles that gave residents the opportunity to come together and listen to one another tell stories. The events did more than build community—they helped people get specific about the things they care about most. After sharing stories in small groups of about six, each participant was asked to jot down the themes and values they heard (a process called “harvesting values”). Groups discussed the patterns that emerged from the exercise to help identify and refine Damariscotta’s community values.

Could Story Circles work in your city or town? [Find more about organizing Story Circle events online](#), and then use the Harvesting Heart and Soul Values worksheet to distill community values.

TASK 4.3

Share the stories

Sharing the collected stories and information with the community is key to letting people know that they were heard and that their time answering questions or taking a survey was well spent. It is also an opportunity for people to hear each other's stories and see themselves and their neighbors as a part of a larger community story.

Sharing or rebroadcasting stories can and should happen in a number of ways. It can happen in person during the storytelling event when this activity is conducted in small groups or at public events. If your team captures stories with video, audio, and photographs, the stories can be edited together into a short video that conveys the diversity of people and perspectives that "tell the tale" of the community. These videos can be posted online and played during subsequent community gatherings or other public events.

The power of Heart & Soul is that it **created a critical mass of positivity** that overcame old differences that had become obstacles in the community.

» *John Alden, Planning Commissioner,
Essex Junction, VT*

In some instances, storytelling and sharing can be employed for the specific purpose of building empathy and relationships between disconnected groups. In these cases, harvesting information is secondary to simply allowing people to speak, be heard, and listen to others.

STEP 5

Identify Community Values

This is the cornerstone of Community Heart & Soul. In this step the Heart & Soul team and community members use the information extracted from stories to state what matters most to the entire community. These statements represent the community's values, which provide the starting point for discussing issues, opportunities, and ideas for the future.

Step 5 includes three tasks:

- 5.1 Draft community values and goals
- 5.2 Review and confirm values and goals
- 5.3 Finalize values and celebrate

TASK 5.1

Draft community values and goals

Using the data that was organized in Task 4.2: Organize the data, have a representative team of volunteers begin to craft a set of community values and goals. The values need to incorporate the diverse perspectives of those who live or work in your community. They will express a shared vision and will be used to support decisions. The goals will begin to reflect the specific scope of the project and describe the community's aspirations for each value.

Community values represent what is most important to residents and include those things that distinguish a community or make it a good place to live.

Each community value statement captures a theme or a particular aspect of the community's heart and soul. A group of eight to ten value statements can paint a complete picture of what residents hold up as the most important characteristics of their community. Each value statement also outlines the benefits that can be achieved. Including these benefits is a good way to clarify the theme and remind people why the theme is important in the first place.



ON THE GROUND

PLACES OF THE HEART

Maps are a useful way to help residents pinpoint the places in town that are really great. Of course, a dot on a map doesn't tell the whole story.

The Heart & Soul team in Biddeford, Maine took a creative approach to learning about great places in town with its HeartSpots Memory Lane project. After learning about favorite spots around downtown on maps, the Heart & Soul team hung wooden signs at special places that had been identified on the maps. Residents were asked to share their stories of that spot by calling a toll-free number and recording a memory or a wish for the future. Recordings were transcribed and then posted on an online HeartSpots map.

This walk down memory lane not only offered the Heart & Soul team a deeper understanding of Biddeford's most loved places, but it also helped build community pride.

HeartSpots stories reminded everyone of Biddeford's past strengths and its potential for success.

In the example statement below, "*sense of community*" is the theme and "*people feel accepted, connected and supported*" outlines the benefits. Together, these create a community value statement.

"We value our sense of community, where people feel accepted, connected, and supported."

Value statements do not have to describe the community as it is now. They can also be aspirational, such as in the example below.

"We will be a safe community, where people can move around at anytime, going anywhere, and feel at ease."

The first set of community value statements drafted by the team should be understood as just that—a draft. This first set might include statements that will later be refined or combined with others.

When drafting the community value statements, ask: Does each statement accurately portray that aspect of the community? Is the whole set of values fully representative of the community? Are there missing elements, or are there overlaps that could be combined?

While drafting the community value statements, the team must also start to clarify and refine the list of goals that were first identified during story gathering in Step 4. Goals describe the future condition of a value. Goals do not recommend specific actions or solutions, rather, they describe a strategic focus and a direction. A well-framed goal will naturally lead to (rather than answer) the question: "Okay, how do we do that?" You will answer this question in Phase 3: Make Decisions.

FIGURE 6: POLSON MONTANA'S DRAFT VALUE STATEMENTS

Local Economy	We value a strong local economy that provides opportunities for all residents to live, work, and thrive here.
Downtown	We value a thriving, diverse, inviting downtown that enhances our sense of community and is safe, fun, and walkable.
Governance	We value an ethical, transparent local government that encourages respectful, civil dialogue, so together we can build a stronger community.
Education	We value life-long learning opportunities that prepare us for work and help us contribute to the local community.
Natural Beauty/ Active Lifestyle	We treasure the exceptional beauty of our natural environment and its premier features such as Flathead Lake and the surrounding mountains, which provide us healthy recreational, spiritual, and economic benefits.
Youth	We value our youth, empowering them to serve and grow through engaging activities and leadership opportunities to positively impact their future while building confidence and self-worth.
Diversity	We value people as the heart of our community and being a place where everyone can feel appreciated, respected, and included.
Tradition/ Heritage	We value all the traditions, heritages, and family ties which together unify us as a neighborly community that provides a sense of safety, belonging, and feeling cared for in our daily lives.

Write this list of draft community value statements and goals with some help from a writing professional so that it can be released for public review in presentations, posters, newsletters, flyers, or online (in every case being clearly labeled “Draft”).

FIGURE 7: DRAFT VALUE STATEMENT AND GOALS FROM POLSON, MONTANA

Draft Community Value Statement

Local Economy: We value a strong local economy that provides opportunities for all residents to live, work, and thrive here.

Draft Goals

1. It will be easy to start and operate a business here.
2. New businesses will locate here.
3. Local stores will provide for our basic needs.
4. People who work here will be able to afford to live here.

Along with the drafted list of community value statements and goals, include a description of the process that led to it, the community value statements or goals that didn't quite make the cut, and the ideas and issues previously collected (in Task 4.1: Listen and learn, and Task 4.2: Organize the data). By doing all this, you are letting participants know that they were heard and that their input matters. This will inspire them to stay involved.

TASK 5.2

Review and confirm values and goals

From this point in your Heart & Soul process, community engagement focuses on the community value statements. These statements play a vital role in Phase 3: Make Decisions since they provide a way to understand the community's current situation and evaluate or prioritize actions. Because so much builds from here, it is essential that the community values be understood, discussed, and confirmed by the broader community and by any specific stakeholder groups with whom you expect to collaborate or negotiate. It is also essential that the community value statements are specific enough that they can guide future decisions and actions.



ON THE GROUND:

A POP-UP CUP OF JOE

Heart & Soul leaders in Essex, Vermont heard time and time again that people in Essex wanted a coffee shop. It wasn't that they necessarily needed a cup of joe that badly. What they really needed was a “third place”—a place for people to informally gather and connect. To set the wheels in motion, Heart & Soul Essex created temporary, or “pop-up,” coffee shops around town.

Providing free food and drink as well as live music and board games, the pop-up coffee shops created lively spaces for residents to mingle and meet neighbors.

[!\[\]\(f1c5da15572e3e09d343161be98f508d_img.jpg\) Learn how to create your own successful pop-up shop with online tips from the Better Block Project.](#)

Encourage discussion through a variety of means—with focus groups, at a community gathering or open house, and with surveys. This review should ask participants to either confirm or suggest improvements to each of the community value statements, to the list of community values as a whole, as well as to the draft goals. Ask participants if there are other values or goals that should be considered, and whether any of the values and goals are more or less important than the others.

Keep an accurate record of everyone's feedback, as this will provide a strong rationale supporting the confirmed set of community value statements. This documentation is also useful should you seek an endorsement of these values from elected officials.

We are **creating successful economic development** that pays tribute to...where we come from. Without that base, we risk becoming "some revitalized city" instead of an evolving Biddeford with culture and flavor and strengths that need to be maintained while adding the new.

» *Delilah Poupore, Executive Dir., Heart of Biddeford (ME)*

TASK 5.3

Finalize values and celebrate

The feedback received during Task 5.2 to review and confirm the community values will give your Heart & Soul team the green light to revise and finalize the value statements. (At this time it is okay to keep the goals in "draft" form and refine these later.) Heavily publicize and distribute the final set of community values to any committees, clubs, or other groups that have been engaged in this process so far. Ask your select board or city council to officially adopt or endorse the values.

Add some ceremony to this milestone. Write the confirmed set of community values as a formal declaration and invite everyone to sign it. Stencil them on a wall at city hall or in the local high school or at the community center. Write them into a song. Print them on posters for local businesses to display. Spread flyers around town, each highlighting a different community value. And then get ready to celebrate.

By the time you get to this moment, your team has achieved a lot and worked hard, and many steadfast volunteers may be getting burned out. Take time to pat each other on the back, raise morale, and throw a party. This could be a volunteer-appreciation event, or a bigger community-wide event.

STEP 6 Get Oriented

Put the community values in context by examining the ways that each value has been strengthened or eroded over time, whether they are getting better or worse, and setting goals for how they could improve in the future.

Step 6 includes two tasks:

6.1 Examine the situation

6.2 Refine the goals

TASK 6.1

Examine the situation

Examining the actual condition and trajectory of each community value statement, as well as what forces are influencing this trajectory, will help your team determine potential strategies for protecting and enhancing them.

Until now your conversations with community members may have been pretty open-ended. This is a good time to steer the discussion toward the specific context of your work. If it is focused on the downtown, for example, or the local economy, this conversation can be set in that context and zoom in on details that inform your process: How are our community values evident *in the downtown*? What changes *in the downtown* have made our values stronger or weaker? How is the *local economy* doing, and how does this affect our values?

Related facts and trend data are important to this conversation. What is the population and how has it changed? What are average rents or home prices? People's perceptions and observations enrich this data by putting a face on facts and figures.

Discussions that consider the current condition of community values and how they have changed over time can have a powerful effect on people’s understanding of the present situation and what they want to achieve for the future. Simple questions can prompt rich dialogue: What is the current condition of this community value and where is it heading? What is working in our community related to this value? What contributes positively to this value? What needs to change? What threatens it? [Figure 8]

It is one thing to know that your community’s values are on the decline or on the rise. It is another to understand the factors that cause these trends. Understanding the underlying causes helps you tailor the most effective response. Without this analysis, your team may find itself leaping to temporary or popular solutions rather than solutions that address the root causes of an issue.

TASK 6.2

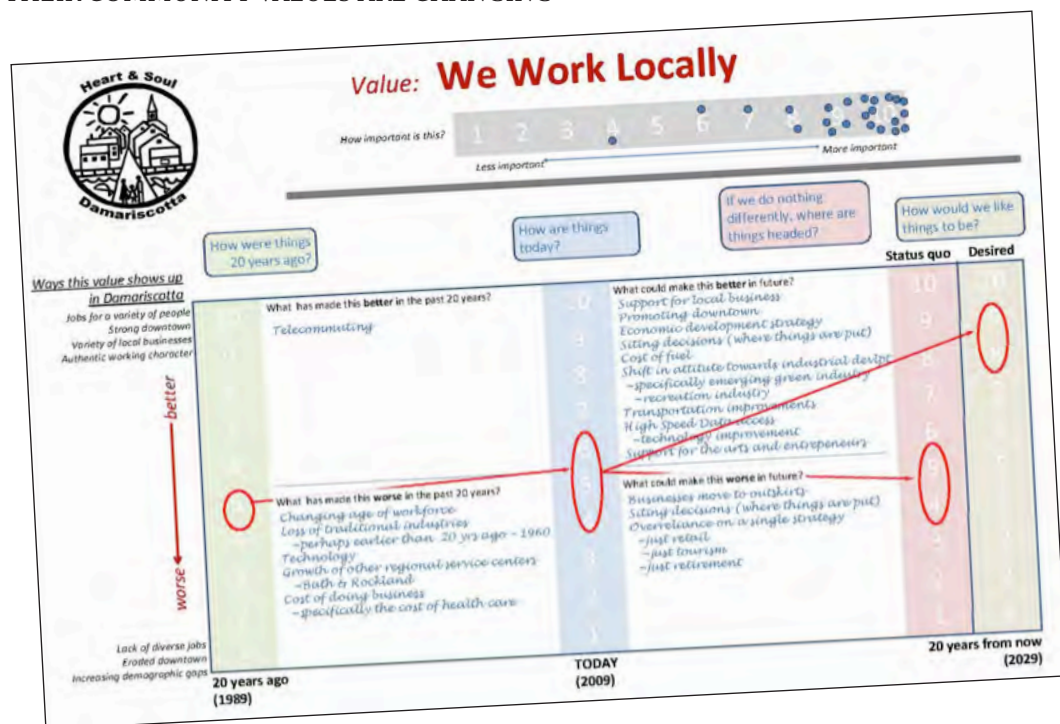
Refine the goals

With an understanding of the forces affecting your community values, you can soon develop actions and policies to protect and enhance them. Before diving in to a brainstorm of ideas and options [see Step 7: Develop Options], set specific goals for each value that describe the results your community hopes for within the scope of your work.

You already have drafted goals from your work in Task 5.1: Draft community values and goals and Task 5.2: Review and confirm values and goals. Revisit these with the team and with the community. Do the goals respond to the conditions or trends you’ve identified? Can they be revised or added to so that they will? Remember that goals can either describe the desired results of any action or policy you pursue, or describe the desired future condition of a community value. In this way, goals clarify specific intentions for each value and justify actions or policies that are recommended to strengthen community values.

A simple way to generate more goals or review the ones you have is to ask people to describe successful results or impacts that the Heart & Soul project could achieve, based on any or all of the values and the situations and trends affecting their trajectory. Ask, for example, “What will our community look like or be like in five years *if we value our youth*? How will it be different?” If your Heart & Soul work has a specific context, such as informing a downtown master plan, ask “What will our *downtown* look like in ten years if we value our youth?” Similarly, you can ask people to consider and answer questions such as: What is working? What needs to change? What would progress look like?

FIGURE 8: A "CHANGE OVER TIME" EXERCISE CAN HELP COMMUNITY MEMBERS UNDERSTAND HOW AND WHY THEIR COMMUNITY VALUES ARE CHANGING





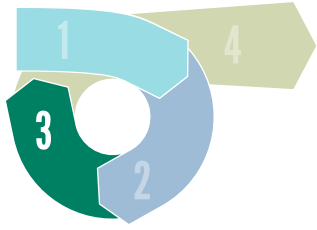
ON THE GROUND

CREATE A VOICE— AND A PLACE—FOR YOUTH

Youth in Biddeford, Maine couldn't recall the time when all the textile mills were active and downtown was buzzing.

To them, the downtown was a downer, with vacant storefronts and little activity. To get youth interested in Heart & Soul, team leaders connected with Biddeford High School teacher Carolyn Gosselin. Carolyn saw an opportunity: have her students learn video skills while interviewing parents and grandparents about Biddeford's glory days. Students took to the idea and wove together stories of Biddeford residents' and business owners' experiences. The project also led to youth attending public meetings, leading tours of historic mills, and advocating for language in the downtown master plan geared to attracting and supporting youth.

Carolyn and Heart of Biddeford Youth Coordinator Holli Andrews developed the LearnLocal Place-Based Education Curriculum to help students learn about local issues and create a voice for youth in municipal decision making. [📄 Visit learnlocal.us to get started with community-based learning.](https://learnlocal.us)



Phase 3

MAKE DECISIONS

Making decisions is about figuring out how to protect and enhance your community's values and how to build toward a future that honors them. What are the options available to your community and which should be pursued? Also important to the decision-making process is figuring out when things will be done. What will you do this year and what will you work on later?

Phase 3 includes three steps:



Develop Options

This step involves generating ideas, turning them into options, and developing criteria to evaluate and prioritize those options. Whether you'll use your community values to inform an economic development strategy for the Chamber or land use plans for the City, you need to know your options. You also need to know how to weigh those options and choose the best ones.



Make Choices

This is the step where you make choices to narrow down the options. In order to do this effectively, you've got to think about which options will lead to the best results, which are most needed, and which will take years to put in motion. It's time to do a cost-benefit analysis, prioritize, match actions to local capacity, and stay realistic about timing.



Formalize Decisions

This step is about turning the recommendations into formal decisions and an action plan, and ensuring that commitments are secured to make things happen. Commitments could include the local government adopting policies or civic and non-profit organizations formally adopting ideas for actions.

Phase 3 CHECKLIST

A well-organized Heart & Soul process will have the following elements in place by the end of Phase 3:

- ❑ A summary of ideas about how to enhance the community's heart and soul

- ❑ A list of viable options for consideration, based on those ideas

- ❑ A process for evaluating options that lends credibility to key decisions

- ❑ Decisions about which options to pursue, captured in a policy document or action plan

- ❑ Commitments to those decisions by local agencies and organizations or local governments, as appropriate (by adopting, ratifying, or signing agreements)

STEP 7

Develop Options

This step involves generating ideas, turning them into options, and developing criteria to evaluate and prioritize those options. Whether you'll use your community values to inform an economic development strategy for the Chamber or land use plans for the City, you need to know your options. You also need to know how to weigh those options and choose the best ones.



OUR SUPPORTING HOMES FOR ALL AND FOSTERING A VIBRANT LOCAL ECONOMY WILL YOU WITH THIS STEP.

Step 7 includes two tasks:

7.1 Gather ideas

7.2 Turn ideas into options

TASK 7.1

Gather ideas

By now your Heart & Soul team has a list of ideas collected from all previous public engagement activities. Some may be carried over from other projects, the town's old comprehensive plan, or a neighborhood plan. Some may have sprouted from hearing about what another community has done. Others will reveal themselves as community members share their thoughts.

This is a great time to get more people involved and seek expert help. Crowdfund ideas online, hold discussion groups, talk to people at the summer festival as you hand them a hot dog, or host an "ideas fair." Hire someone who can recommend best practices, share success stories, or explore design alternatives for Main Street. Set up a task force to research and address specific challenges.

Taking the time to ask good questions that are crafted to the context of your specific project will generate more helpful ideas. The best ideas emerge when they are developed in consideration of community values and the challenges and opportunities relating to those values. Instead of saying "How can we make our community better?" say "Our community values its small town character, but it's expensive to maintain our historic buildings. What could we do to address this challenge?"

The biggest challenge here is to manage people's expectations that their ideas are the ones that will get done, and also to make sure that the ideas you gather are relevant and helpful to your specific Heart & Soul project. Make sure people know that not every idea or proposed solution will be implemented, and that the process will narrow and prioritize the ideas based on impact, feasibility, or urgency. [Figure 9]

When considering how to reach out to community members, keep in mind that you don't have to ask everyone to solve everything. This is a good time to bring specific topics to specific groups of people who either care about or have experience with that topic: bring the cycling safety questions to people who bike; bring the dog poo problems to people with dogs and the people who stepped in it. But don't go too far by pandering to special interests. Diverse perspectives are fundamental to finding good solutions and maintaining a transparent process, so involve a range of people in each issue.

TASK 7.2

Turn ideas into options

Options are ideas that are *viable*. If an idea is impossible to implement, it is not an option. This task requires the team to transform ideas into realistic strategies for action.

It's more important than ever to document this process. People need to feel heard in order to continue participating, and this means they need to know what happened to

FIGURE 9: ASK FOR IDEAS IN THE CONTEXT OF COMMUNITY VALUES AND CONDITIONS

VALUE: <i>Small Town Character</i>	Trends, Challenges, Opportunities	Ideas, Solutions:
Value Attribute: Historic Buildings	Expensive to maintain, restore. Zoning does not allow adaptive reuse.	???
Value Attribute: Rural Landscape	Nearby farms are struggling, converting to hobby farms or rural estates.	???

their own ideas. Keep track of the ideas-to-options process, and report out to community members on how the ideas were handled and why.

Here are five useful ways to process ideas:

1. **Filter.** Remove ideas that are impossible or out of scope for the Heart & Soul project. If possible, pass them on to other projects or organizations that are more suited to the task.
2. **Combine.** Combine redundant ideas or expand an idea to capture several similar ones.
3. **Set the Foundation.** Some ideas imply a need for preliminary actions or policies that lay the groundwork for the idea (or multiple ideas) to happen—that is, the foundational first steps. If several ideas point to the need for a new program, additional staffing, or a new committee, then the original ideas can be packaged together with the foundational requirement.
4. **Develop Scenarios or Strategies.** Combine ideas into a bigger program or long-term strategy. This is especially relevant to land use planning or design where ideas fit a specific concept, such as *smart growth*, or where they hinge on a certain approach, such as creating a pedestrian-friendly downtown.

5. **Re-scope and Clarify.** Some ideas may need more clarity around what it would take to make them happen. Others may be broad, and need to be more narrowly defined in terms of the scope of your work. It is easy to support a general idea such as "clean up the town," but the actual option for a town plan might be to recommend the use of town funds to "support or staff a cleanup program."

It is helpful to organize options into categories. This helps your audience and collaborators consider a long list of options in small, related groups and compare apples to apples. When you order pizza and a drink, for example, you do not wonder whether to get either pepperoni or root beer. You choose pepperoni from your list of pizza options, and root beer from your list of beverage options. Similarly, it would not be helpful to ask people to choose between a new lamppost and a new library. Categories could include the size or cost of a project, the community value that each idea supports, the time required (short, long, forever), or the responsible parties to make it happen (the City, specific departments or committees, non-profits).

During this task, and throughout the remainder of the project, keep an eye out for low-hanging fruit—that is, ideas that are easily doable, highly visible, and broadly supported. Figure out how to get these done. This can be a huge motivator and confidence builder for your team and the community.

FIGURE 10: EXAMPLES OF IDEAS TURNED INTO OPTIONS

<i>IDEAS</i>	<i>OPTIONS</i>
Make Main Street more beautiful!	Start a Main Street improvement fund with \$25,000 of Town funds
More parking on Main Street Do angled parking on Main Street Build a parking garage	Research state and federal regulations and compare with other towns' solutions to understand alternatives
Plant flower gardens at the edges of our parks Replant the medians and maintain them this time! Put up flower baskets along Main Street Start a community garden Help seniors maintain their front yards	Start a volunteer gardeners' club with \$4,000 per year for expenses from the Public Works budget
Promote/allow growth in the downtown Allow denser housing/smaller lots close to downtown Protect farmland outside of town	Land Use Scenario 1: Focus on downtown redevelopment
Allow big retail near the highway. Continue to subdivide farms at the edge of town	Land Use Scenario 2: Focus growth in areas outside of downtown

STEP 8

Make Choices

This is the step where you make choices to narrow down the options. In order to do this effectively, you've got to think about which options will lead to the best results, which are most needed, and which will take years to put in motion. It's time to do a cost-benefit analysis, prioritize, match actions to local capacity, and stay realistic about timing. As Aesop's cat says to the fox, "Better one safe way than a hundred on which you cannot reckon."

Step 8 includes three Tasks:

8.1 Evaluate options

8.2 Develop and review recommendations

8.3 Finalize recommendations

TASK 8.1

Evaluate options

Now your team has a list of options that are within the scope of the project and within the realm of possibility. You will need some intelligence on these options, including potential costs or impacts, organizational interest, and benefit to community values. It's time for the tough work of prioritizing some options over others, devising ways to make them better, and understanding the trade-offs between incompatible options.

The importance of setting priorities suggests that it's also time (again) to think hard about who is involved in this process. Broad participation provides more perspectives to draw from and is especially appropriate for tough issues that affect everyone. Targeted participation, on the other hand, can tap stakeholders with specific knowledge or interests. Have your volunteers reinforce their connections to local organizations, neighborhood leaders, and municipal departments—indeed to any key people who may be responsible for making the team's recommendations actually happen.

There are essentially three kinds of evaluation situations:

1. No-brainers. Some options may not need much evaluation time or effort if they are clearly supported, do not necessarily require a big investment

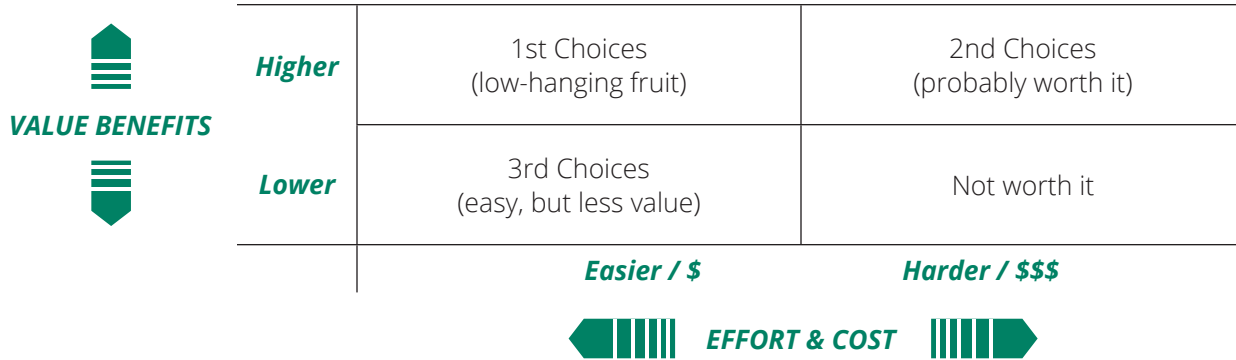
of resources, and do not compromise other options. This is often true of policy statements (in a town plan, for example) that do not indicate any specific action. Some no-brainer options may even be required, such as state-mandated standards that are tied to funding. Your team probably doesn't need to take a deep dive into evaluating these options, but simply needs to identify them. Options that are no-brainers can be fast-tracked to the final list of recommendations.

2. Setting priorities. This is where there are many options that can't all be done at once. They are simply competing for the limited time and money your community can furnish. These options require priorities to be set. Sometimes you don't need to choose between one option and another, but only need to decide which to do first. Priority actions get front row seats because they have some combination of the following characteristics:

- They offer strong and clear benefits in terms of enhancing and protecting the community's heart and soul
- They offer good value in terms of cost
- They are most urgent
- They are highly recommended or supported by the community
- They necessarily precede other actions (the first step or the foundation to making other actions possible)
- There is a champion who is ready to make them happen
- It is such a great idea that a champion or funding is guaranteed to materialize

Your team can talk through these characteristics or use a system of scoring each option to help identify priority actions. The benefit-effort table is a basic tool to facilitate this conversation in a small group. First choices are options that have the highest community benefit for the least effort. The team can further prioritize based on public sentiment, potential uptake (are resources immediately available for this option?), urgency (does this address an immediate need or is it an opportunity with a short time frame?), or logical sequencing (does one option need to happen before another?).

FIGURE 11: SETTING PRIORITIES MATRIX



3. Choosing between alternatives. Sometimes two or more options are permanently incompatible or in direct competition with each other. As examples, you can only have one land use policy, one location for a library, or one redevelopment option for a vacant lot. This situation requires a choice between trade-offs since you can't choose two locations for one library, and you can't say both "yes" and "no" to the proposed retail redevelopment near the highway. Answering these big questions is often the entire scope of a project.

So how do you choose? Let's say there are two proposed options for how to develop an empty city-owned lot in the downtown. The conversation, for years, has gone like this: One side of the room shouts, "Community center!"

and the other side shouts, "More parking!" Using values to organize and inform this discussion can give participants a better way to zoom in on the real concerns and better understand the trade-offs. Using a matrix is a simple way to consider this decision based on community values, and quickly shows that in this case the community center option has a better impact on community values.

This approach can expand to include any number of community values and any number of options, including financial impacts or other common evaluation criteria. Ultimately, this tool enables better conversations, but it does not make the decision for you! The team, the community, and the decision-makers have to make the final, value-informed choice.

FIGURE 12: A SIMPLE CHART CAN HELP PEOPLE UNDERSTAND HOW DIFFERENT OPTIONS WILL AFFECT COMMUNITY VALUES

VALUES	Benefits of OPTION 1: COMMUNITY CENTER	Benefits of OPTION 2: A SURFACE PARKING LOT
Small Town Character / Image	Architecture complements historic character VALUE BENEFIT: VERY HIGH	Trees screen parking area VALUE BENEFIT: LOW
A Strong Economy	Ten new jobs. Draws in customers to Main Street shops VALUE BENEFIT: HIGH	More parking for Main Street shops VALUE BENEFIT: MODERATE
A Welcoming And Inclusive Community	Will be ramp-accessible and include a daycare VALUE BENEFIT: VERY HIGH	Would provide easier downtown access for seniors VALUE BENEFIT: HIGH

TASK 8.2

Develop and review recommendations

Now that you've prioritized actions, it's time to report out on your recommendations and seek support or feedback on them. Someone on the team needs to summarize the recommended priorities and actions, include the rationale, and provide a summary of the review process. Consider who should review these recommendations: your own team, other committees, department heads, elected officials, local civic groups and nonprofits, members of the community, or specific stakeholders? "All of the above" is often the right answer.

If your work is about developing new local government policies or plans, a formal review is often required that includes neighboring towns, regional agencies, and tribal governments. This formal review would include prescribed procedures (public notices, committee hearings, a public review, and council readings). Tribal governments, for example, often need to hold ratification votes for major new policies or strategic plans.

If your efforts are more focused on action plans, policies, or strategies that will be championed by non-profits and civic organizations, which will already be involved or represented by now, this is the time to seek out champions and develop commitments to action. Bring your prioritized lists to those organizations, if you haven't already, and ask them to pick and commit to the ones that align with their mission. Explain how many people were involved in the process to develop the actions and how they were selected. Point out how each action or policy supports community values.

Communication and outreach is a critical aspect of this task. Make the information clear and easily available online and in print, send the right messenger to the right groups, and clarify how feedback will be used. In certain instances, a feedback form or survey can be helpful to get answers to key questions or to standardize feedback.

TASK 8.3

Finalize recommendations

Given the extensive community participation that led to these recommendations, the feedback you receive during Task 8.2: Develop and review recommendations should be reasonable. But there could always be a curveball, and



ON THE GROUND

VISUALIZE VALUES TO STEER CHANGE

You've identified values with your whole community. Now, how do you make sure that future growth and development uphold the most-loved aspects of your town? Using community values, the Heart & Soul team in Damariscotta, Maine created alternative planning scenarios.

To better understand which alternative designs could enhance particular community values, the team used a structured value-mapping process that defined the influencers of change for those values (those things that could have a positive or negative effect). The team applied this information to each scenario during a multi-day workshop using CommunityViz® planning software, an extension for ArcGIS Desktop originally developed by the Orton Family Foundation. CommunityViz offers a visual and quantifiable way to show how values are expressed in the community. In some cases, the difference between scenarios was striking. Public feedback on the visualization exercise was incorporated into the City's Illustrative Plan, which is their roadmap for directing growth and strengthening their community's heart and soul.

[Request a demo and download a free trial version at placeways.com.](https://placeways.com)

if this happens your team will need to consider whether a concern is big enough or legitimate enough to do another round of engagement or if you should ease off from that particular issue.

The rest of the work in this task is to consider how to incorporate feedback into the final recommendations. Some comments you will receive will be about the ideas that didn't make it into actions, and you will likely receive even more new ideas. Will your team revisit these, or are you confident in your decisions? Other comments will add details or suggest wordsmithing. In these cases, be generous and incorporate as much as you can. Reviewers appreciate being heard.

STEP 9

Formalize Decisions

This step is about turning the recommendations into formal decisions and an action plan, and ensuring that commitments are secured to make things happen. Commitments could include the local government adopting policies or civic and non-profit organizations formally adopting ideas for actions.

Step 9 includes three tasks:

9.1 Craft the plan

9.2 Adopt the plan

9.3 Celebrate the milestone

TASK 9.1

Craft the plan

The plan is essentially a report that summarizes the Heart & Soul process, describing the issues that were considered, the community values, the conclusions and recommendations, and an action plan for making these recommendations happen. If your work has been to inform certain policies, such as a comprehensive plan or master plan, this report would actually be the policy itself. However, it is often the case that a group conducts this work outside of a specific policy project, and so instead of writing a key policy may suggest changes to many different government policies in their recommendations.

Heart & Soul fed directly into our new master planning process.

» Barb Peterson, Town Clerk, Paonia, CO

The first sections of your report have all been written by now, as they are the record of each phase of the process and were posted for public access along the way. The final section that needs to be developed is an effective implementation plan that for each recommended action or policy change spells out the what, who, why, and when to make it happen. The best way to put this plan together is to first set up a simple template, then ask the person or organization responsible for each task to fill in the rest. This ensures that the tasks and timeline are as realistic as possible.

An implementation plan includes these seven basic elements:

1. **Action.** Give this a name that is quickly understood.
2. **Action rationale.** The rationale for the action can be explained in terms of the decision-making process that led to selecting the action, the purpose and expected results of this action, and the community values and goals that the action seeks to benefit.
3. **Champion / action leader.** Who will lead the charge on this action? Who will play supporting roles and what are they?
4. **Tasks.** What are the key tasks or steps required to accomplish the objectives?
5. **Timeline.** When will key tasks be underway or completed? When will the effort wrap up?
6. **Milestones.** Are there key successes or results to point to along the way?
7. **Resources.** Are there any resources available such as grants or large organizations offering support?

TASK 9.2

Adopt the plan

With the final report in hand, your team is ready to make the recommendations official. Who adopts the recommendations and how this is done depends entirely on the nature of the recommendations and each town's governance. If the plan is focused on municipal issues, there are usually required procedures leading to formal adoption.

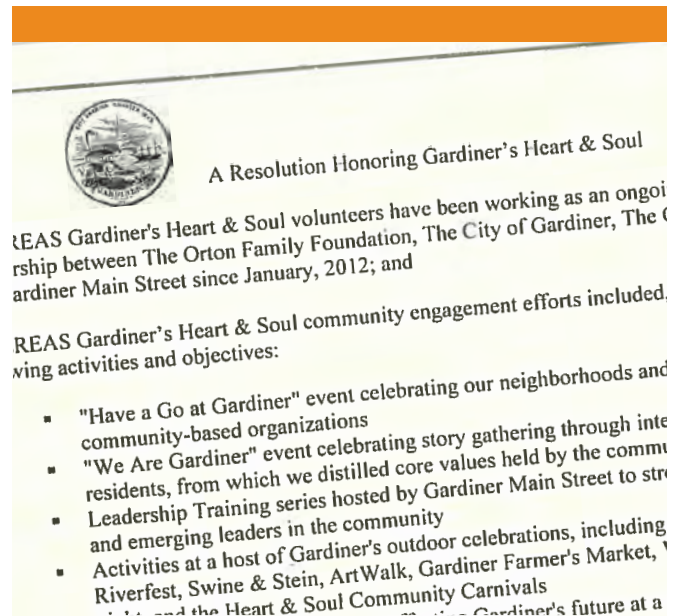
This is a great time to ask your select board or council to formally adopt the shared community values. If this is a strategic plan for an organization or partnership of organizations, it's likely that the plan needs to be endorsed by the directors or boards of those organizations. Your team needs to do its homework to understand how to navigate this task.

When asking decision-makers to approve an implementation plan, it is critical that they understand what it is and where it is coming from. This is as true of non-profit board members or program directors as it is of elected officials. Throughout the process you should have been giving decision-makers regular updates, sending them newsletters, inviting them personally to each event, and giving them the chance to speak and participate. Many of them have been involved with the Heart & Soul team in some capacity. However, if anyone is new to your effort or has been absent or aloof for any reason, offer to bring them up to speed. Be prepared to present the work and emphasize all the evidence of public support for the conclusions.

Heart & Soul has made Gardiner a **stronger, more cohesive community**. While there is much work to be done, we now have the foundation—built from all aspects of our community—on which to move forward.

» *Thom Harnett, Mayor, Gardiner, ME*

If there are any contentious circumstances to address, it is critical to rally supporters at this time. Publicize the dates of any hearings, broadcast the merits of the Heart & Soul approach, and remind people to show up. Offer rides and babysitters. People may be burned out or assume that the plan is a done deal and not realize that some aggravated person or group may attend these meetings to speak or vote against adoption of the plan.



ON THE GROUND

MAKE IT OFFICIAL!

On January 18, 2014, Gardiner, Maine's city council unanimously adopted a resolution upholding the values identified by its fellow community members during the Heart & Soul process.

"Now, therefore, be it resolved that current and future Councilors of the City of Gardiner will root their decisions in these values, which represent the most common core ideals from a broad segment of the community..." [📄 Read more.](#)

TASK 9.3

Celebrate the milestone

Congratulations, the plan is adopted! (Phew!) It's time to celebrate and pat each other on the back. Build this celebration into the budget and ask someone to organize the party. Go out of your way to recognize volunteers for

their time, dedication, and hard work. Offer awards such as thank-you letters from the mayor, gift certificates to local businesses, a bouquet of flowers, or a day off.

Finally, remember to invite everyone back next month to support the Heart & Soul stewardship team's work [see Phase 4: Take Action].



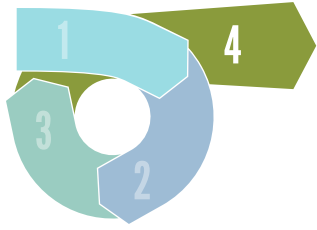
ON THE GROUND

MOBILIZING OUR COMMUNITY

Heart and Soul of Essex, Vermont combined their shared community values with creativity and art to remind each other of what matters most.

For two weeks a resident artist worked with scores of students and parents to learn about crafting mobiles and the messages they can represent.

The result? More than 200 students helped create 54 individual mobiles. To celebrate the accomplishment, all of the mobiles were hung together in the Essex High School cafeteria for an opening event and exhibition. Each mobile visually expresses an aspect of the Essex Town and Village Community Values established through the Heart & Soul of Essex process. At the end of the exhibition, businesses, families, and individuals who supported the project chose a mobile for their home, business lobby, or storefront to create permanent visual reminders of what matters most to Essex. [Read about Essex's values online.](#)



Phase 4

TAKE ACTION

Taking action is about following through with the action plan and doing the work needed to produce results. A particularly important action is to create a stewardship team that will keep watch on how all of the actions are progressing. This stewardship team coordinates the work and communicates progress to keep community members engaged and decision-makers accountable. This team also looks for ways to infuse civic culture and any community decision-making process with the principles of Heart & Soul.

Phase 4 includes three steps:



Mobilize Resources

In this critical step, your team needs to shift resources and leadership toward long-term follow-through and implementing the action plan. Without an organized, deliberate effort to transition the leadership to stewards who can make the actions happen, even the most dynamic community plan will not be achieved. A lot of energy and good will went into the plan's creation so make sure it doesn't get filed on a shelf to collect dust.



Follow Through

Heart & Soul establishes a path to the future that includes many incremental actions. It also establishes a compass that helps the community reorient itself as circumstances change. This step is about initiating that first set of actions and then keeping an eye on the compass to be sure that you are heading in the right direction.



Cultivate Heart & Soul

The Community Heart & Soul process is about inclusive and meaningful community participation and using community values to inform decision making. You are cultivating the heart and soul of your community by encouraging these concepts to spread and by building capacity where necessary to help make it happen.

Phase 4 CHECKLIST

A well-organized Heart & Soul process will have the following elements in place by the end of Phase 4:

- Short-term actions and the early stages of longer-term actions will be underway
- Public acknowledgments of support for the Community Heart & Soul process and its results
- A stewardship team tasked with long-term coordination and monitoring
- A system for monitoring and reporting on progress
- Expanded capacity and interest in community engagement and the use of community values in decision making



OUR **STEWARDSHIP THE FUTURE OF OUR COMMUNITIES** TAKES A CLOSER LOOK AT WHAT IT TAKES TO ENSURE FOLLOW THROUGH AND LONG-TERM SUCCESS.

STEP 10

Mobilize Resources

In this critical step, your team needs to shift resources and leadership toward long-term follow-through and implementing the action plan. Without an organized, deliberate effort to transition the leadership to stewards who can make the actions happen, even the most dynamic community plan will not be achieved. A lot of energy and good will went into the plan's creation so make sure it doesn't get filed on a shelf to collect dust.



OUR ENHANCING LOCAL CHARACTER, FOSTERING A SENSE OF COMMUNITY AND ENCOURAGING INCLUSIVE, OPEN GOVERNMENT WILL HELP YOU WITH THIS STEP.

Step 10 includes three tasks:

- 10.1** Set up a stewardship team
- 10.2** Gather and align resources
- 10.3** Sustain commitments and momentum

TASK 10.1

Set up a stewardship team

Before the Heart & Soul team wraps up its commitment and disbands, consider how your Heart & Soul project will live on in the community. Who will be responsible for stewarding the project—keeping an eye on the big picture and ensuring the community meets its goals?

Project stewardship is often undertaken by one of the partners—a non-profit, a municipal department, a standing committee, or a foundation. Where this isn't possible or appropriate, a new volunteer team may be created to carry the torch, or a new non-profit may be developed for this purpose. The goal for any such group is to oversee long-term implementation of the community's vision and action plan.

Roles and responsibilities of the stewardship team, whoever they may be, typically include:

- Monitoring and communicating the implementation of actions and continuing to find people or organizations to lead new efforts

ON THE GROUND

THE 'DUCT TAPE COUNCIL'

As Gardiner, Maine's Heart & Soul process started winding down, local volunteers realized it was time to consider how to sustain momentum and continue the great work they had started. Several volunteers and non-profit representatives agreed to form a new ad hoc team, dubbed the "Duct Tape Council."

Their mission:

1. To foster greater communication, understanding, and trust among the active groups and institutions in the community
2. To strengthen collaboration between and among those existing organizations
3. To maintain momentum from the Heart & Soul process
4. To ensure that the city council and community groups incorporate Gardiner's Heart & Soul values and principles into their day-to-day work.

- Monitoring and communicating changes to community values and adjusting priorities as conditions change
- Supporting collaboration and communication between implementation partners
- Sustaining ongoing support for the Heart & Soul project from community leaders and members
- Applying the Heart & Soul approach and community values to other efforts
- Celebrating and communicating successes

Consider the composition of your stewardship team and actively recruit where there are gaps. The more representative of the community the stewardship team is, the more successful it will be. The team could include people involved in the original Heart & Soul effort, implementation partners, representatives of community groups or business associations, key contacts from foundations or other funding sources, community leaders, and any other Heart & Soul champions.

Don't forget that the same best practices apply for establishing this group as for your original Heart & Soul team. These include using formal operating documents that outline the purpose, scope, tasks, and responsibilities of the team, as well as group governance and leadership, the decision-making process, communication procedures, and participation expectations.

TASK 10.2

Gather and align resources

New programs or projects always require money, people-power, or both. Sometimes this means fundraising and finding more volunteers, but in many cases the resources may already exist and can simply be redirected.

Grants are most likely to come from existing government agencies or foundations that have previous experience in your community and are already invested in your success. If you've kept them up to date on the Heart & Soul project all along, they will be eager to see you succeed. More challenging is to seek funds from new sources. Cultivating new donors requires some time, and it's a good idea to ask for help from skilled grant writers and development professionals within your community. In any fundraising process, be prepared to tell the story of your Heart & Soul effort to show how the proposed implementation program or project will benefit the community and achieve community goals.

Seek the help of local legislators, who can alert you when state or federal funds may be available and who will support your application. Keep your legislator informed of your project with phone calls, emails, invitations to events, and Heart & Soul communication materials.

Heart & Soul efforts improve communication between agencies and organizations that are ready, willing, and able to find ways to maximize or redirect their existing resources. Be sure to encourage continued communication and collaboration between these organizations, and find out if existing resources might be realigned to support the new priorities that have emerged.



ON THE GROUND

MICRO GRANTS FOR MACRO RESULTS

A community plan requires commitment from government, but are most likely to succeed when they have far broader ownership. After completing the Golden Vision 2030 planning process, City employees and elected officials knew they needed ways to empower residents to take action.

The City of Golden created the i-Golden Neighborhood Grants program to offer small grants for resident-led projects that support community values. Through i-Golden grants, the City supports many local efforts including beautification, block parties, and pedestrian safety improvements.

Learn more about starting a small grants program with the Grassroots Grantmakers Short Course on Grassroots Grantmaking.

[Visit \[grassrootsgrantmakers.org\]\(https://grassrootsgrantmakers.org\)](https://grassrootsgrantmakers.org)

TASK 10.3

Sustain commitments and momentum

The Heart & Soul process inspires many people to become more involved in the community. Now is the time to sustain this energy and direct it toward taking action. Ask partners and community leaders to publicly acknowledge their support for the project results. Mobilize community members by showing them how to get involved and support the work.

Public acknowledgments of support help keep action plans on everyone's radar and give them continued credibility. These may look different in each community. Examples include:

- Resolutions from City officials, partners, and non-profit boards supporting the final Heart & Soul results and committing staff or financial resources to implementation activities
- Letters in the newspaper or advertisements from community leaders supporting the results and next steps

There are many ways to mobilize community members. To begin with, don't assume people know what's happening. Also, don't let anyone assume that someone else will do it or that everything is taken care of. You may need to:

- **Get in front of people.** Create a roadshow presentation that you can deliver to civic organizations, business associations, city council, boards (such as Parks & Rec, Planning, and Zoning), or other important community groups that have been involved or will need to be involved. Use the radio call-in shows or other media outlets to keep the project on everyone's radar.
- **Update the website.** Update your website to reflect the results of the Heart & Soul process and next steps. Make sure there are "contact us" and "how can I help" buttons.
- **Use visual aids.** Create a process map that visually shows what the next steps are and when they will happen. Integrate this into your messaging. Get flyers up around town, leave postcards, or use other creative ideas to get the project's next steps known in the community.



ON THE GROUND GOLDEN CARES C3

When residents of Golden, Colorado came together for Heart & Soul conversations, they discovered the value of building relationships across sectors and disciplines.

A unique partnership between the City and local churches led to the creation of Golden Cares C3 (Caring Connected Community), a web-based community resource to increase and sustain collaboration in the city.

The website brings available services, skills, and supplies in the area to one central site and helps facilitate connections between people looking to provide and access local resources.

[Visit \[goldencares3c.org\]\(https://goldencares3c.org\) to learn more.](https://goldencares3c.org)

- **Use print advertisements.** Run a full-page advertisement with results and next steps in the local papers. Include contact information!
- **Send e-newsletters.** Contact your email list with e-blasts on the project's next steps.
- **Ask for personal commitments.** Get people to indicate their support by making a personal commitment to action or toward realizing the community's values in some way.

STEP 11

Follow Through

Heart & Soul establishes a path to the future that includes many incremental actions. It also establishes a compass that helps the community reorient itself as circumstances change. This step is about initiating that first set of actions and then keeping an eye on the compass to be sure that you are heading in the right direction.

Step 11 includes two tasks:

- 11.1 Initiate actions
- 11.2 Monitor and adjust

TASK 11.1

Initiate actions

It's time to get started on the short-term actions of the implementation plan [see Task 9.1: Craft the plan]. Remind the parties or individuals responsible for each action (including yourself) to build these actions into their workplans, put them on their committee agendas, allocate appropriate budgets, or seek the necessary green lights from their bosses or elected officials.

It is important to keep in mind that this task could actually happen very early in the Heart & Soul process and continue throughout. If a feasible action idea is proposed during any phase of community engagement, take the opportunity to make it happen right away. Install those bike racks outside the library, replace the bulbs in those streetlights, or start webcasting council meetings. Whatever it is, these small successes are an excellent way to motivate the public and build confidence in the Heart & Soul approach.

TASK 11.2

Monitor and adjust

It is the stewardship team's job to track the implementation of actions and keep an eye on the status of community values. Essentially, the stewardship team seeks to answer everyone's questions: What has been accomplished and what needs to be done next? How are our actions helping our community's heart and soul? And, critically: Have conditions changed enough that we should reconsider our plans or priorities?

For tracking progress on actions, it is fairly straightforward to check off completed actions on the implementation plan. For multi-year actions, it is helpful to establish smaller milestones to celebrate along the way.

To understand how community values change over the years, it's helpful to consider the use of indicators. A weathervane is an indicator, literally, of which way the wind is blowing. The direction of the wind, however, often tells a bigger story—about tomorrow's weather. Indicators of community values may be as straightforward as average house prices, employment rates, and business start-ups or failures, for example. Many communities are using several broad indicators to take a periodic big-picture snapshot of their situation and progress, using terms such as "Quality of Life" or "Genuine Progress" to represent this group of indicators (or index). The stewardship team can establish a single indicator or an index for each community value, or initiate some other means to take the community's pulse on a regular basis.

An important part of monitoring the project is to respond to new issues and revisit priorities. This is a proactive approach to project management and stewardship. When things change—due to new leadership, demographic shifts, closing businesses, changes in state or federal funding, a natural disaster, or other causes—it may be necessary to discuss how the community can respond and whether current priorities or action plans should be reconsidered.

Finally, when the success hits the fan, respond by celebrating these moments, big or small. Some communities hold annual gatherings that include a celebration of the year's successes and recognition of individual contributions.



ON THE GROUND

MAKING VALUES "TOP OF MIND"

As a Heart & Soul process starts to wind down, you might wonder how your community can ensure its values aren't forgotten.

What about the new neighbor down the street or incoming elected officials? How will they know what is important in your community?

Golden, Colorado captured the hopes, ambitions, and ideas from their project and published them with a list of community values, creating a storybook called *Voices, Values, Visions*. The book was sent to all households and remains available to visitors, community groups, and new residents, helping to ensure that what matters most to the community will live on.

STEP 12

Cultivate Heart & Soul

The Community Heart & Soul process is about inclusive and meaningful community participation and using community values to inform decision making. You are cultivating the heart and soul of your community by encouraging these concepts to spread and by building capacity where necessary to help make it happen.

Step 12 includes two tasks:

- 12.1** Foster a participatory culture
- 12.2** Embed values in decision making

TASK 12.1

Foster a participatory culture

Your Heart & Soul process will have introduced new or improved ways to engage the community in decisions, including who to involve and how to do it. This philosophy and the tools that make it possible may inspire other organizations or committees to follow your lead, and members of your team will likely relay their learning into new efforts.

As the project team wrap ups its work, consider:

- What methods worked well with engaging the public that might also be applied to local projects or decision-making processes? Can your team members document and share those methods with other organizations or groups, or offer to help apply them in new situations?
- Were new groups or networks involved in the process that are usually not included in civic discussions? What will it take to keep the door open for those groups, help them remain connected, or help other organizations remember to connect with them?
- How will the practice of broad and meaningful engagement and active participation become the norm in your community? How will newly elected leaders or others be oriented to this approach? Would your city or town

benefit from a new policy that encourages or even mandates open, transparent government and community engagement? Would it benefit from a new staff or leaders orientation program?

- What civic “infrastructure” (interactive places, online forums, groups, leadership training programs) can be created or strengthened to foster better dialogue and participation? Many Heart & Soul teams develop training programs or guides and make these available to local organizations.

TASK 12.2

Embed values in decision making

Using community values to understand and evaluate important decisions is an essential benefit that Heart & Soul brings to communities. The values identified during your process can be reapplied in a variety of circumstances, but only if the community’s leaders and decision-makers honor those values and understand the benefits of using them.

Community values can be used, for example, as principles or foundational policy goals in comprehensive plans, strategic plans, downtown master plans, or other local plans or policies. They can also be used to guide decisions about how to strengthen or create new programs, facilities, or services for community organizations.

Continued use of values in decision making requires both commitment and the capacity to actually employ the values in an effective way. It might be that the Heart & Soul process and the use of values were so successful that everyone voluntarily refers to them. In some communities, commitment is encouraged through new policies or is even mandated (by city council for departments to use in strategic planning, for example).

Capacity to employ the values effectively requires an ongoing effort to equip leaders and decision-makers with values-based decision-making and evaluation tools. The stewardship team could assume this task and provide ongoing support and training for new staff or community leaders.



ON THE GROUND

HEART & SOULMATES AWARDS SUSTAIN WHAT MATTERS MOST

Love of community can be found in the everyday and in everyone. That thinking spawned the Gardiner, Maine Heart & SoulMates Awards. The first recipients, Albert (age 78) and Elizabeth (age 77), were honored for their support of downtown Gardiner.

The couple tries to walk the four-mile-round trip from their home to Water Street every day, rain or shine, to support local businesses.

"We come to visit the ladies in the bank. We go in the stores. And then we go home," Elizabeth says. "That's how we do it." Gardiner Heart & SoulMates Awards looks for signs of community spirit, positivity, and actions that contribute to making Gardiner special. "There are many heroes among us in our small towns," Karen Tucker, Heart & Soul volunteer, says. The award recognizes "...everyday acts of individuals that are instrumental in shaping the look and feel of our unique community."

BEGINNING

at the Ending

Time and time again we hear from towns that the intensive, inclusive Community Heart & Soul™ method becomes the basis for better decisions long after the process has officially concluded.

To illustrate the lasting, practical value of Community Heart & Soul, we leave you with examples of two results from towns where we've worked.

Four years after [Victor, ID](#) (pop 1,900) wrapped up its Heart & Soul project, the state transportation department showed up with a standard site design for a key intersection in the city—including a traffic light and a flashing pedestrian crossing signal to let folks know that they had 12 seconds to sprint across four lanes of traffic. Locals felt the plans didn't reflect the importance of that particular intersection to the town's character. Thanks to Heart & Soul, the town had at hand the documentation and the expertise to counter the proposal with a pedestrian-friendly design that featured "bump-outs" and other amenities. Victor successfully negotiated to get the state to adopt a better design.

Brittany Skelton, Victor planning and zoning administrator, credits Heart & Soul with inspiring the new design.

"It is no exaggeration to say that Victor's community character and walkability is irrevocably tied to that intersection, and Envision Victor resulted in a more livable town," Skelton said.

In [Cortez, CO](#) plans for a 4,800-square-foot convenience store and gas station across the street from a high school raised concerns among neighbors and school officials. Traffic, noise and crime were among the issues on neighbors' minds.

The property was appropriately zoned and plans met city requirements. The Planning and Zoning Commission recommended approval but asked that the company, Utah-based Maverik, meet with neighbors and the school, the kind of open, proactive approach the city had learned from its Heart & Soul work.

The city organized a meeting at the high school with Maverik, neighbors and school and city officials. Building and Planning Director Kirsten Sackett presided at the meeting, logging the issues raised. Next the group prioritized concerns and worked on resolutions.

When it came time for the public hearing and city council vote a few weeks later, neither neighbors nor school

officials spoke in opposition; they'd all come together beforehand and agreed to a compromise. The neighborhood meeting proved to be good business even before the store opened, Maverik permit manager Todd Meyers said.

"We have a positive image going in to it as we open our doors. We haven't stepped on anybody's toes as we could have if we hadn't had that process," Meyers said.

Sackett hopes requiring developers to meet with neighbors becomes a standard part of the approval process.

"I envision that as the way we'll do business from now on, where our Land Use Code requires neighborhood meetings instead of just posting a little notice in the paper that nobody reads," she said.

For over two decades the Foundation has been developing tools and resources that help communities apply democratic ideals to building better futures. Our success will be measured by how many small cities and towns share our vision and adopt what we believe is a viable way to involve everyone in making their community a better place.

In the history of the City of Gardiner there has never been...a more tireless effort to collect the **voices and visions** of our citizens, upon which to base our future and the daily decisions we make, in order to **embody the will of the community**.

» *from Resolution Honoring Gardiner's Heart & Soul, adopted by Gardiner (ME) City Council*

ACKNOWLEDGMENTS

ORTON FAMILY FOUNDATION

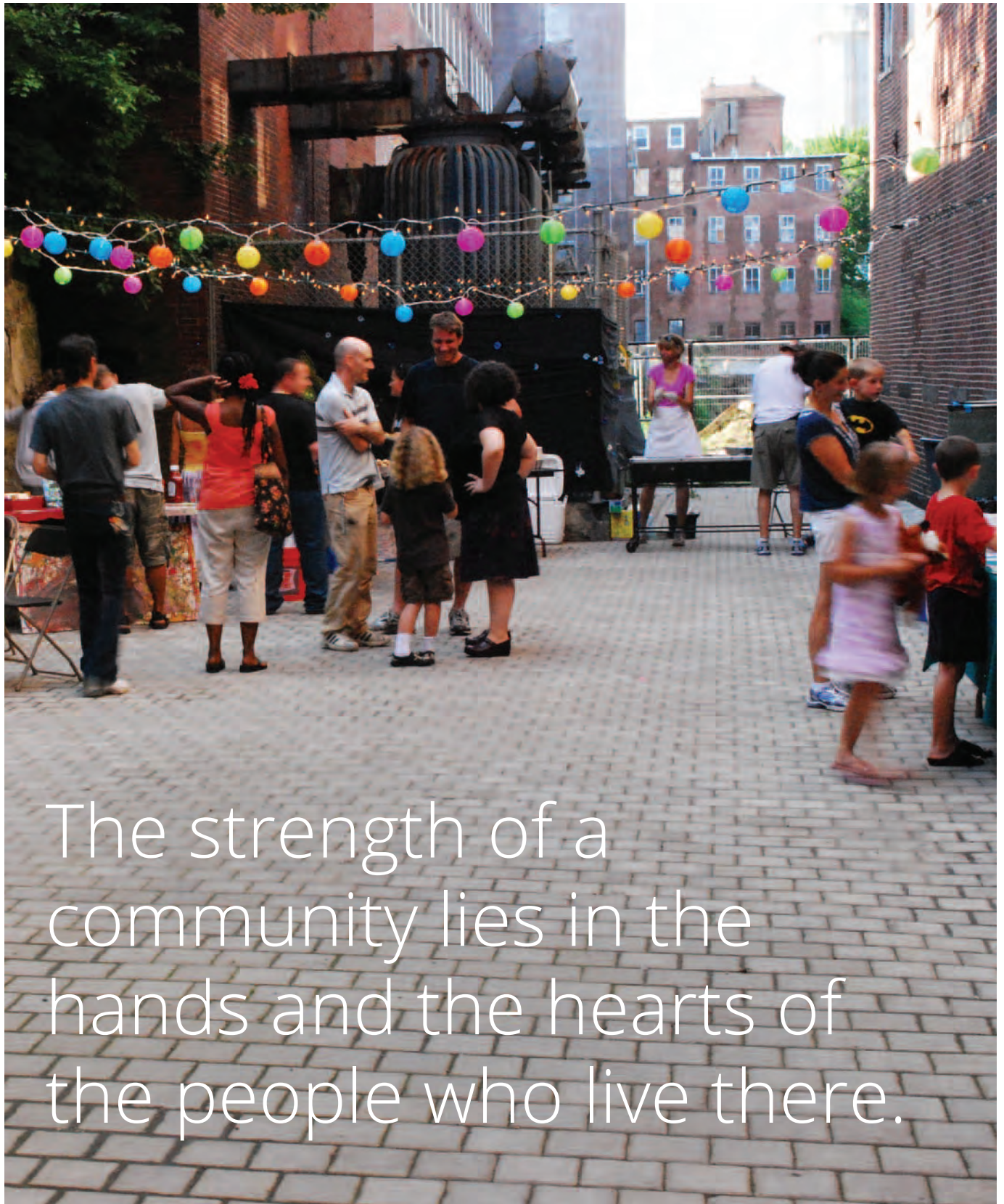
The Orton Family Foundation is a small family operating foundation that invests in practices that enhance the ability of citizens to participate in local decision making. Our initiative, Community Heart & Soul™: Guided by What Matters Most, is a new approach to community planning and development designed to help people in small cities and towns navigate change in a way that honors their connection to community and upholds the unique character of each place.

The Foundation wishes to thank the many individuals, local elected and appointed officials, community volunteers, and likeminded practitioners, non-profits, foundations and trade organizations that have contributed in countless ways to our development of the Community Heart & Soul approach.

A special thank you to the residents, volunteers, and leaders in our nine Community Heart & Soul Towns who learned with us—on the ground—to evolve the Heart & Soul method presented in this Field Guide. We could not possibly have done it without all of you, a community of inventive, determined people.

Finally, deep gratitude to Lyman Orton—founder, board chair, and funder of the Orton Family Foundation—for his generosity, passion, and patience. Community Heart & Soul would be a dream, not a growing reality, without his persistent belief in the regular folks who live and work in America's small towns..

Learn more about Heart & Soul [visit *www.orton.org/heart-soul*](http://www.orton.org/heart-soul).



The strength of a community lies in the hands and the hearts of the people who live there.



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