

Community Heart & Soul™

— Guided by What Matters Most —

RESOURCE



For Heart & Soul Process Phase

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Community Network Analysis Tool



ORTON FAMILY
FOUNDATION



WHAT WE BELIEVE

The Orton Family Foundation's mission is 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.

We do this by assisting the residents of small cities and towns in the use of the Heart & Soul method, a barn-raising approach to community planning and development designed to increase participation in local decision

making and empower residents to shape the future of their communities in a way that upholds the unique character of each place.

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ACKNOWLEDGMENTS

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.

The Foundation wishes to thank the many individuals, local elected and appointed officials, community volunteers, and like-minded practitioners, non-profits, foundations and business 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 partner Community Heart & Soul towns who learn with us, on the ground, to evolve the Heart & Soul method presented in this Guide. We could not possibly have done it without all of you, a community of inventive, determined people.

Finally, our deep gratitude to Lyman Orton—founder, board chair and funder of the Orton Family Foundation—for his generosity, passion and guidance. 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 at orton.org/heart-soul

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Introduction

Have you ever been in a situation where you had something to say but couldn't find a way to be heard? You may experience this frustrating situation on a personal level, either at the dinner table or at gatherings and meetings. Now imagine that experience on a community-wide level, with additional obstacles to being heard, such as work schedules, lack of daycare to attend meetings, lack of transportation or ability to use digital tools, or even just not feeling like you belong. It's important to remember that no community, no matter how small, forms a uniform entity. It is composed of unique, diverse people, groups and organizations, many of which rarely intersect with the others.

The Orton Family Foundation's Community Network Analysis resource is a powerful tool to better understand who lives, works and plays in your town and how best to

reach them *where they are*. It gets you beyond the "same-ten-people syndrome" by helping you reach more diverse groups of residents so the entire community can have a voice in their town's future

Community Network Analysis is a new breed of tool for stakeholder assessments. It helps your Heart & Soul Team examine *who* to connect with and *how*. It goes beyond simply assessing attitudes in traditional stakeholder analyses by also assisting your team to carefully identify segments of your population that are typically underrepresented in both formal and informal social networks. This step-by-step guide will help you make more use of local knowledge balanced with census data and, ultimately, prepare you for achieving the broad engagement and participation throughout your town that makes Community Heart & Soul Principle 1, "Involve Everyone", move from aspiration to reality.

Community Network Analysis is a new breed of tool for stakeholder assessments.

How and When to Use Community Network Analysis

We cannot stress strongly enough that Community Network Analysis (CNA) is imperative to Heart & Soul work. And your initial analysis should be completed at the very beginning of your process not only to determine who is in the community and how to reach them, but also to establish a Heart & Soul Team that mirrors your town's demographics.

As important as this first analysis, Community Network Analysis should be applied to all four phases of the process and revisited for specific purposes, such as evaluating the success of the team's outreach, engagement and publicity efforts. In short, use Community Network Analysis to identify the *breadth* of demographics in your community and how to get at the *depth* of what matters most among residents.

The tables in this resource include examples to provide guidance for each step of your Community Network Analysis. We don't recommend that you apply the examples verbatim because every community is demographically unique.

Remember to track participation at activities and events, even if it's just recording who attends. This information will help you understand whether your outreach and engagement tools and approaches are appropriate for target audiences. See examples for tracking data in the appendices to this resource.

In addition, Community Network Analysis can benefit anyone seeking more diverse, broad engagement and participation in their work, from policy makers and healthcare advocates to homegrown community organizers and local non-profits seeking more support.

Who Does It?

Community Network Analysis is only as good as the knowledge of the people who pull it together. At first you may only have a small group to do the analysis, but don't be deterred. As the Heart & Soul Team engages more people

and brings more diversity into planning and implementing its efforts, you'll have chances throughout the process to improve your analysis.

Step Summary

Here are the Community Network Analysis steps in a nutshell:

1. Know your demographics

Use demographic data to create a community profile of who lives and works in your community. Identify groups and individuals who will affect or be affected by the project.

2. Identify community networks

Identify formal and informal groups and where in the community those groups regularly gather.

3. Find network connectors

List key individuals seen as trusted members of the different networks in your community.

3a. Assess network resources: Identify skills and capacity that different networks can bring to your effort.

3b. Understand network interest in the project: Estimate the level of interest/skepticism different groups will have in your project, nurture relationships with all groups.

3c. Recognize network connections: Map out links between different community networks and identify partnerships

4. Identify communication opportunities

Learn where and through which channels your networks share and receive information.

5. Identify engagement opportunities

Consider demographics and networks when developing engagement approaches.

Overview of Community Network Analysis applied to the Heart & Soul process

During Phase 1: Lay the Groundwork of your Heart & Soul process use Community Network Analysis to:

- Identify potential leaders or partners for your initial Heart & Soul Team
- Verify demographic representation of your initial team
- Identify community participants, which will inform how you design project communications and engagement activities

During Phase 2: Explore Your Community and Phase 3: Make Decisions of your process use Community Network Analysis to:

- Confirm that input is gathered from a demographic representation of your town
- Verify the inclusivity of your project and track new relationships.

• Assess ways to increase community collaboration, connections and partnerships to carry out your community's agreed on goals

During Phase 4: Take Action of your Heart & Soul process use Community Network Analysis to:

- Confirm partnerships, networks between groups, and leadership required to take action and ensure outcomes are realized
- Measure how effective you were in achieving inclusive participation, which can inform future community efforts.

After formal Heart & Soul process:

- Use your Community Network Analysis and known engagement methods to continue reaching and communicating with missing voices as well as formal and informal groups.

The Five Steps

As you work through the steps, organize information in a matrix or excel spreadsheet to use as a resource as you plan Heart & Soul activities and as a resource to ensure you've reached all demographics in your community.

Step 1. Know your demographics

Use demographic data to create a community profile of who lives and works in your community. Identify groups and individuals that will affect or be affected by the project. Local knowledge and data should be combined with socioeconomic and population data to ensure full community participation, particularly by groups that present a greater challenge to reach or might be a minority in terms of religion, race, class, education, income, or age.

Our experience shows that missing voices tend to be among low-income, working class youth (25 years old and younger); families with young children/single parents; racial and ethnic minorities; and residents resistant to change. We recommend using this list as a lens for identifying missing voices in your community.

Use this profile to double-check whether you are being inclusive as you move through the steps in Community Network Analysis and when you design and carry out activities. Here are a few resources that allow you to create profiles of your town:



Economic Profile System Human Dimensions Toolkit Developed by Headwaters Economics, this Microsoft Excel based tool allows people to produce detailed socioeconomic profiles. [Free]



American Factfinder The US Census Bureau created this online tool where you can customize demographic reports that draw on the most recent Census data. [Free]



Dataplace Online tool that allows you to examine a variety of socioeconomic data that comes from US Census and other sources. [Free]



Esri Tapestry We strongly encourage using Esri Tapestry data combined with another demographic data source noted above. Tapestry data provides detailed information about location of specific demographics and typical behaviors of that group. This is useful when developing outreach and engagement approaches. [Basic level is extremely informative, \$50]

Make sure to include people and organizations that are typically *not* part of the public process, as well as those who might be skeptical of your planning effort. One useful brainstorming technique is to have each person write stakeholder group names on individual sticky notes (one per note), post them all on the wall, and then organize them according to any overlap.

Table 1 Example includes Esri data and local census data. The Esri data includes categories of groups that are helpful to examine further. While this may take a little longer to digest, we guarantee it will be worth your time. See Esri Tapestry Segmentation, page 4.

Table 1: Example list of demographics

LOCAL DEMOGRAPHICS

**Esri Tapestry*

†*Local Data*

† Homeless ⁽¹⁾

† Chronic poverty/low-income

† List of committees/groups and issues or who they represent ⁽²⁾

† School-aged youth ⁽³⁾

* Family Landscapes,

* Barrios Urbanos (Hispanic population) ⁽⁵⁾

† Military residents/families ⁽⁶⁾

† Youth/young adults (18-25 yr)

† Long-time residents and newcomers

* Senior Styles (population over 65) ⁽⁷⁾

† Non-English speaking ⁽⁸⁾

* Esri Tapestry Data Guide [see pages 14-16 LifeMode Group Descriptions]

See Table 5 for footnote explanations

Tapestry Segmentation LifeMode Group Descriptions

LifeMode Group: L5 Senior Styles

Segment Codes: 14, 15, 29, 30, 43, 49, 50, 57, 65

More than 14.4 million households in the nine *Senior Styles* segments comprise one of the largest LifeMode summary groups. As the US population ages, two of the fastest-growing American markets are found among *The Elders* and the *Silver and Gold* segments. *Senior Styles* segments illustrate the diversity among today's senior markets. Although incomes within this group cover a wide range, the median is \$41,334, attributable mostly to retirement income or Social Security payments. Bunker, more affluent seniors, freed of their child-rearing responsibilities, are traveling and relocating to warmer climates. Settled seniors are looking forward to retirement and remaining in their homes. Residents in some of the older, less privileged segments live alone and collect Social Security and other benefits. Their choice of using depends on their income. This group may reside in single-family homes, retirement homes, or high-rises. Their lifestyles can be as diverse as their circumstances. Senior markets do have common traits among their differences. Golf is their favorite sport; they play and watch golf on TV. They read the newspaper daily and prefer to watch news shows on television. Although their use of the Internet is nearly average, they are more likely to shop through QVC than online.

LifeMode Group: L6 Scholars and Patriots

Segment Codes: 40, 55, 63

This summary group is unique in the Tapestry Segmentation system. The shared traits include youth, with the

The Esri Tapestry Segmentation Reference Guide describes each of the "LifeMode Groups", or demographic profiles, named in Table 1, that is: "Family Portrait", "Global Roots", "American Quilt", and so forth.

When brainstorming whom to reach in your town, team members could go around the table reviewing various demographic groups. Members of the Esri Global Roots group, for example, are ethnically diverse and are, according to Esri data, "...young, earn modest

LifeMode Group: L7 High Hopes

Segment Codes: 28, 48

The *High Hopes* summary group includes *Aspiring Young Families* and *Great Expectations*. These residents are a mix of married couples, single parents, and singles who seek the "American Dream" of home ownership and a rewarding job. Most live in single-family houses or multiunit buildings, approximately half own their homes. Many would move to a new location for better opportunities. Many are young, mobile, and college educated; one-third are younger than 35 years. The median household income is \$40,928.

LifeMode Group: L8 Global Roots

Segment Codes: 35, 38, 44, 47, 52, 58, 60, 61

Ethnic diversity is the common thread among the eight segments in *Global Roots*; the diversity index stands at .88. *Las Casas* and *NeWest Residents* represent a strong Hispanic influence in addition to a broad mix of cultural and racial diversity found in *Urban Melting Pot* and *International Marketplace*. Typical of new households, *Global Roots*' residents are young, earn modest incomes, and tend to rent in multiunit buildings. Their youth reflects recent immigration trends; half of all households have immigrated to the United States within the past 10 years. Married couples, usually with children; single parents; and people who live alone are typical of the household types in the *Global Roots* segments. Because households with children dominate, it is not surprising that spending is high for baby products, children's clothing, and toys. Residents of *Global Roots* are less likely than other groups

LifeMode Segment C
The segment represents rural farms. Employment industries is typic cross America, families, either children. By age for the US di-
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incomes, and tend to rent in multiunit buildings." From other *Global Roots* data we know that *Heart & Soul* outreach materials will need to be translated and that multiunit buildings have common areas that can be used to post information. Descriptions of each LifeMode Group found in the Esri Guide provide detailed information about how to reach those residents, leaving less trial and error for your initial outreach efforts.

Questions to ask:

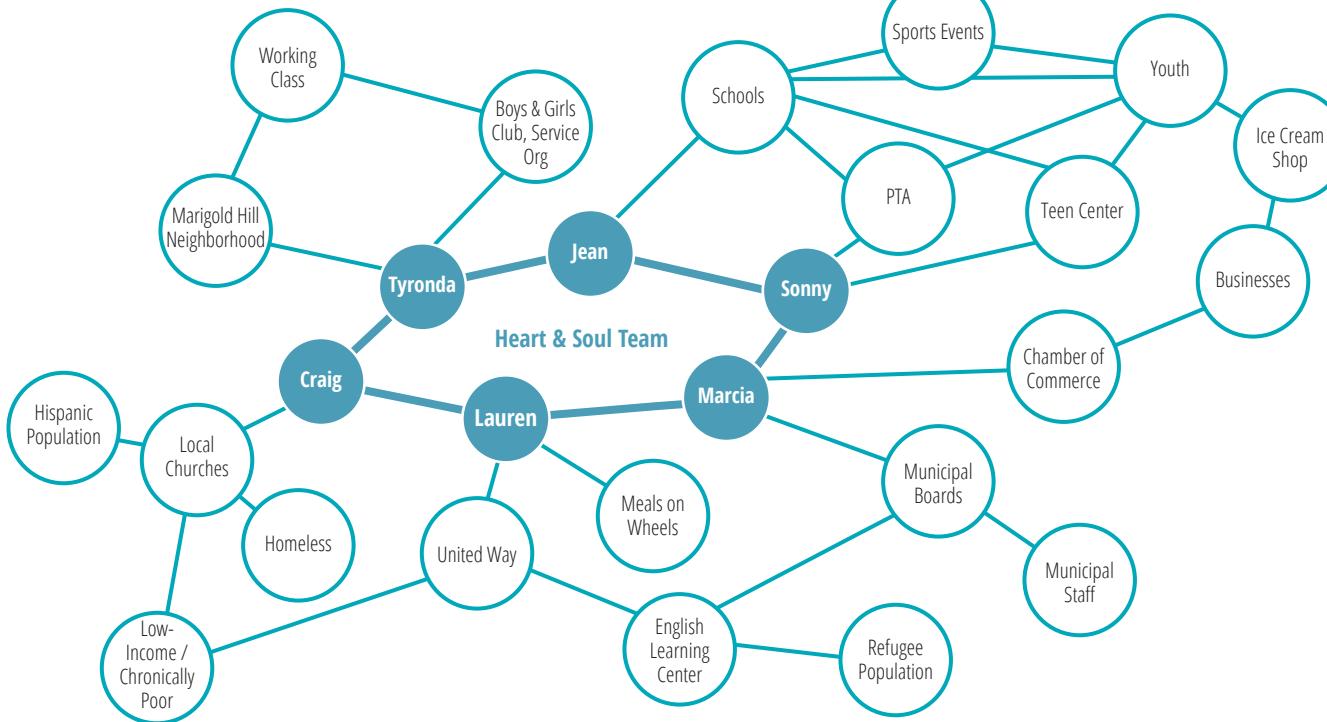
- Who might be affected by the outcomes of the project?
- Who can offer new insights and perspectives?
- Who is responsible for implementing project recommendations?
- Who might oppose or stand in the way of the project?
- What groups exist in the community that we don't hear from?
- Are there priority stakeholders we need to engage and why?

At this point it's important to brainstorm existing groups in your community that represent hard-to-reach demographics. These might include: youth and teen clubs; PTOs; service organizations and clubs such as meals on wheels or Rotary; non-profits; business associations; and faith institutions that serve under privileged residents. In some towns, it's also useful to consider neighborhoods for informal groups that don't participate.

Questions to ask:

- What formal and informal groups exist in the community?
- Looking at your demographics, is your list, Table 1 Example, missing any key groups or neighborhoods?

Example community network map



- Does your Heart & Soul Team fairly reflect the demo-graphics of your community? If not, consciously recruit new team members to better account for the town's diversity. The make-up of the Heart & Soul Team generally predicts who is successfully reached. A relatively homogeneous team will likely fall short of achieving broad, deep engagement

Step 2. Identify community networks

Map out how your networks are organized formally and informally and where these groups gather. Networks are the ways that people are organized and/or connected with each other. These networks are both formal, such as people belonging to a particular organization, and informal, groups of people who share the same local hangout or interest. Networks may also be centered on geography, such as a neighborhood or frequented location. You can outline how stakeholders in your community are connected through networks. See the example map below.

It's easy to identify formal networks. It can be difficult to identify informal ones. So you have to think creatively about the daily routines in people's lives and how they connect with each other. What about laundromats, where in Golden, CO university students gathered, alongside renters and working class residents. Or, as Cortez, CO, another Heart & Soul town discovered, what about all those teens who hung out at the local coffee house that also served as a battle of the bands venue?

Table 2: Example list of demographics and community networks

LOCAL DEMOGRAPHICS		COMMUNITY NETWORKS <i>Think of this as outreach beginning here</i>
<i>*Esri Tapestry</i>		
<i>†Local Data</i>		
<i>† Homeless</i> ⁽¹⁾		Faith based groups
<i>† Chronic poverty/low-income</i>		Service Organizations
<i>† List of committees/groups and issues or who they represent</i> ⁽²⁾		Town committees
<i>† School-aged youth</i> ⁽³⁾		Elementary, junior high/middle school, high school
		Parents
		PTOs
<i>* Family Landscapes,</i>		Four Points Neighborhood
<i>* Barrios Urbanos (Hispanic population)</i> ⁽⁵⁾		
<i>† Military residents/families</i> ⁽⁶⁾		Military service organizations
<i>† Youth/young adults (18-25 yr)</i>		Coffee shops, pubs, laundromat, food delivery places
<i>† Long-time residents and newcomers</i>		Farmers
<i>* Senior Styles (population over 65)</i> ⁽⁷⁾		Retirees/Seniors
<i>† Non-English speaking</i> ⁽⁸⁾		ESL (English as a Second Language) Center or service organization

*  Esri Tapestry Data Guide [see pages 14-16 LifeMode Group Descriptions]

See Table 5 for footnote explanations

Keep an eye out for uncommon networks as well. Libraries and coffee shops might, for example, have postings for a genealogical group that attracts people of all ages and socio-economic status, or a dungeon and dragons game group that attracts youth and young adults.

Questions to ask:

- What formal organizations represent your demographics?
- What informal ways are people organized, and where do they regularly get together?
- Who on the Heart & Soul Team has connections with these formal and informal networks?

Step 3. Find network connectors

List key individuals seen as trusted members of the different networks in your community. Connectors are people who are trusted by others to provide sound counsel, useful information, and help link people to each other. Be sure to list people who are connected with hard to reach demographics. (See Table 3 Example, page 7.) Members of your Heart & Soul Team may be network connectors or they may be connected to people who are. However, you may find that you don't have any direct connections to certain target demographics. That's where knocking on doors, making phone calls, and building relationships will need to start from scratch. These relationships may lead to partnerships later in the Heart & Soul process. See A Closer Look at Connectors, page 8.

If they are willing, network connectors can provide insights into the community, be ideal core project team members or help spread the word about your work. Network connectors complement other communications methods (like mailings and posters), and provide the personal touch necessary to get people to participate.

Table 3: Example list of demographics, networks and network connectors

LOCAL DEMOGRAPHICS *Esri Tapestry †Local Data	COMMUNITY NETWORKS <i>Think of this as outreach beginning here</i>	NETWORK CONNECTORS
† Homeless ⁽¹⁾	Faith based groups	Sam (deacon of church with soup kitchen)
† Chronic poverty/low-income	Service Organizations	Sara (health dept. w/school back pack program)
† List of committees/groups and issues or who they represent ⁽²⁾	Town committees	Committee chairs, Town Clerk
† School-aged youth ⁽³⁾	Elementary, junior high/middle school, high school	Principal, counselor, teachers, student council
	Parents	
	PTOs	
* Family Landscapes ,	Four Points Neighborhood	Celeste (local activist and pastor)
* Barrios Urbanos (Hispanic population) ⁽⁵⁾		
† Military residents/families ⁽⁶⁾	Military service organizations	Jan (wounded warrior program), Tom (community center liaison for military men/women)
† Youth/young adults (18-25 yr)	coffee shops, pubs, laundromat, food delivery places	Social media
† Long-time residents and newcomers	Farmers	Frank and Josie (old timer farm family)
* Senior Styles (population over 65) ⁽⁷⁾	Retirees/Seniors	Melissa (senior center coordinator), service providers
† Non-English speaking ⁽⁸⁾	ESL Center or service organization	Patsy (ESL Center coordinator), Hank (church group offering English classes)

*  Esri Tapestry Data Guide [see pages 14-16 LifeMode Group Descriptions]

See Table 5 for footnote explanations

Questions to ask:

- Who do others routinely go to for advice?
- Who are seen as trusted opinion holders or as leaders in the networks?
- Who regularly spreads the word about community happenings or comes into regular contact with many people?

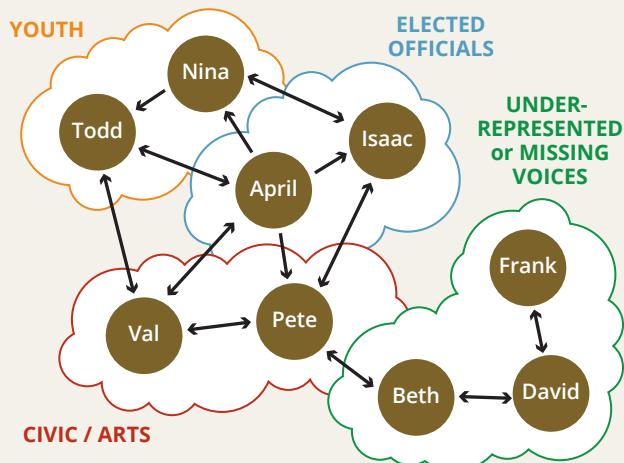
“Snowball” sampling is a good way to find network connectors. This approach can use brainstorming, surveys, or a combination. Snowball sampling means that each person you approach must identify other essential people.

For example, ask an organization’s 10 board members each to identify 10 people or groups they work with and that they think could help the project. Then go to each of the people identified and ask them the same question. The results are exponential, and important patterns emerge.

Certain individuals or organizations will be named much more frequently than others (the connectors), and studies have shown that these people are not usually identified in traditional stakeholder identification processes. Once you have a core project team in place you can also look for the connections they have to the networks. These links are helpful in reaching out to different people at every stage of your project.

A Closer Look at Connectors

Are you coming up with an exhaustive list of possible connectors? Sometimes it can be helpful to map them out like the example below.



Flow of information

Who gets information from whom and are they communicating with other people? Consider how people are connected. Are there connections that could be made, and that would aid in the flow of communication?

Note the importance of April & Pete

The value in doing this exercise is discovering who is central to communication (April) and who has contact with people that would be segregated from the group without them (Pete).

April is a central node, or hub, for communication. Pete provides a connection to outliers or people that have no direct contact with anyone else in the group.

Not all dialogue is reciprocated

The use of arrows can provide insight on the flow of communication.

- ↔ typically shows that the parties share information
- whereas a single arrow shows that information is flowing in one direction but not the other.

Step 3a. Assess network resources

Identify skills and capacity that different networks can bring to your effort. Different networks are likely to hold a variety of skills, knowledge, and resources. If, for example, your town includes residents for whom English is their second language, a network might be an English as a Second Language class, which could bring needed translation skills to your effort. This step is particularly helpful when you are starting to gather necessary resources for your initiative, such as funding expertise, meeting spaces, or communications skills.

Questions to ask:

- Do any networks offer assets (like meeting space or equipment) that we could use?
- Do any networks offer specific skills or expertise that would be valuable to the effort?
- Might they consider funding or sponsoring particular events?

While you may do some initial brainstorming about resources, make sure you talk directly with local individuals and organizations about what they might want to contribute. By taking the time to listen and look for these possibilities early on you will likely identify potential assets and partnerships that could leverage the resources you already have.

Example brainstorm on local resources

COMMUNITY NETWORKS	RESOURCE
Chamber of Commerce	Marketing expertise, event sponsorships
Local Churches	Meeting spaces
Main Street Program	Event planning expertise
Schools	Meeting spaces
Teen Center	Social media expertise
Service Organizations	Newsletters to missing voices

NETWORK CONNECTORS ASSETS/SKILLS

Kent Ortega	web development expertise
Monica Romero	Fluent in 3 local languages
Rocky Olson	Spreadsheet expert
Diane Smulka	Videographer
Starr Smith	Social media expertise

Step 3b. Understand network interest in the project

Estimate the level of interest/skepticism different groups will have in your project and nurture relationships with all groups.

When nurturing relationships, remember to convey how important it is to hear from all groups because a community is at its best when all residents have a voice.

Step 3c. Recognize network connections

Map out links between different community networks. As you learn more about what groups and organizations do, it's likely you'll need to prioritize your community outreach and engagement efforts since you can't do everything!

One way to prioritize activities is to understand the level of effort necessary to engage different groups. While involving Main Street business owners, for instance, may be important, if it's likely they will participate without much effort then you don't have to spend as much time developing new ways of reaching out to them. On the other hand, if participation by the Bhutanese community is also important but you think they will be hard to engage, then allocate enough time and resources to succeed with reaching this demographic.

A simple way to do this is by writing your networks on individual sticky notes and putting them up on a wall. Then draw lines to indicate connections among them. The connections might represent people involved with both networks or it could be a formal relationship between the networks, like a committee member that is also a member of a local faith-based group or a local parent teacher organization.

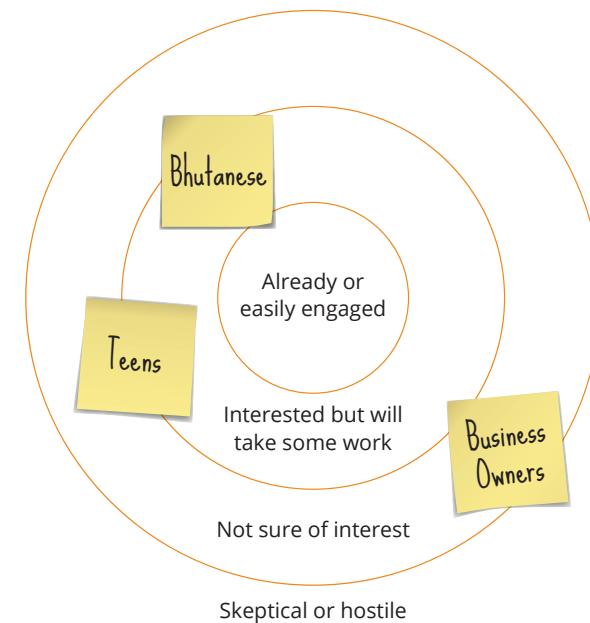
Don't forget about your core project team's connections to these networks! You'll often find that just your small group has many relationships that connect among groups.

It's helpful to organize your stakeholders into the following categories:

1. Already or easily engaged: These are groups that are likely to require little effort to get participation.
2. Interested but will take some work: These are groups where there is likely interest in your project, but that will take targeted outreach for them to participate.
3. Not sure of interest: These are groups for whom you just aren't sure about their level of interest in your project. You'll have to spend some time up front to gauge their interest and how best to get them to participate.
4. Skeptical or hostile: While these groups are often seen as opponents, it can be helpful to explore their key issues early on, which will then help you learn the best ways to engage them and be prepared for their concerns regarding the project.

You can do this exercise by writing each of your stakeholders on a sticky note and then placing each note in one of the categories described above.

Example stakeholder organization exercise



Step 4. Identify communication opportunities

Learn where and how your networks share and receive information. Your networks are going to get and share information in two primary ways – through conversation opportunities and through communication channels. *Conversation opportunities* are the regular places and times—formal or informal—where your networks or network connectors are likely to be available for a face-to-face conversation. *Communication channels* are the different ways that people get and share information within their networks beyond face-to-face conversations (Table 4 Example, page 11).

Questions to ask:

- What are the gathering places where your community's different networks hang out: coffee shops, hair salons, bars?
- What activities do your networks regularly attend: group meetings, sports events, community suppers, ball games, community celebrations?
- Where do your different networks get their news: local newspaper, local radio or television, bulletin boards, websites, coffee shops?

A particular network may get information in a variety of ways; it's important to figure out which ones are the most effective so that you don't spend a lot of time and money using ones that don't actually work that well. Also seek opportunities that hit multiple networks. For instance:

- What community events offer the chance to mingle with multiple networks (county fairs, town wide festivals, church suppers)?
- Which local media channels hit multiple networks?

Step 5. Identify engagement opportunities

Consider your demographics and networks when developing engagement approaches. The final step of your Community Network Analysis is to brainstorm ways to reach people where they are and in a format that feels comfortable to them (Table 5 Example, pages 12 and 13).

Incentives for participation are just as intentional as where and how you meet with people. Remember to look at the demographic you need input from and use incentives that appeal to their needs.

For example, it may be difficult to convince a rancher to come to city hall and sit down in a story circle to share his personal connection to place, but it might be easier to collect a recorded video or have a one-on-one conversation with him on his front porch.

Maintain a keen awareness of each target audience's work schedule and also conflicting community events to increase attendance. Free food is the universal incentive, and free childcare is key when looking to engage young families. For residents with limited incomes or seniors, rides to and from an event or even gas vouchers might make the difference. Consider a fun event, such as a raffle or door prize to attract young participants.

Taking (and making) opportunities to engage with people is an important part of building relationships in your community and continues to be important throughout the Heart & Soul process.

Table 4: Example list of demographics, networks, connectors, conversation venues and communication channels

LOCAL DEMOGRAPHICS	COMMUNITY NETWORKS <i>Think of this as outreach beginning here</i>	NETWORK CONNECTORS	VENUE FOR CONVERSATION OPPORTUNITIES	COMMUNICATION CHANNELS
*Esri Tapestry †Local Data				
† Homeless ⁽¹⁾	Faith based groups	Sam (deacon of church with soup kitchen)	Church cafeteria	Phone and Email to Chris and his word of mouth/flyers to demographic
† Chronic poverty/ low-income	Service Organizations	Sara (health dept. w/ school back pack program)	Back pack pick up event	Phone and Email to Sara and his word of mouth/flyers to demographic
† List of committees/ groups and issues or who they represent ⁽²⁾	Town committees	Committee chairs, Town Clerk	Committee meetings	Town newsletter and website, email
† School-aged youth ⁽³⁾	Elementary, junior high/middle school, high school	Principal, counselor, teachers, student council	Youth event/activity, school carnival, skate park, local diner or ice cream shop, downtown festival - i.e. movies in the park	Email and phone with Network Connectors and connecting with youth use Facebook, Friday folders, school newsletter
	Parents			
	PTOs			
* Family Landscapes, * Barrios Urbanos (Hispanic population) ⁽⁵⁾	Four Points Neighborhood	Celeste (local activist and pastor)	Local church, community center, park shelter	Neighborhood flyers, door to door personal invitations, word of mouth, A-Frame Signs at specific intersections, banners, local radio
† Military residents/ families ⁽⁶⁾	Military service organizations	Jan (wounded warrior program), Tom (community center liaison for military men/women)	Local restaurant, community center, pub	Message through network connector via email, flyers, posters
† Youth/young adults (18-25 yr)	coffee shops, pubs, laundromat, food delivery places	Social media	Downtown event, community activity	Word of mouth, smartphone messaging
† Long-time residents and newcomers	Farmers	Frank and Josie (old timer farm family)		Word of mouth, local paper
* Senior Styles (population over 65) ⁽⁷⁾	Retirees/Seniors	Melissa (senior center coordinator), service providers	Community center, Mills Street market, block party, potluck	Word of mouth, banners, postcards, local paper, senior center newsletter
† Non-English speaking ⁽⁸⁾	ESL Center or service organization	Patsy (ESL Center coordinator), Hank (church group offering English classes)	Local library, restaurant, school, church	Flyers, word of mouth, email

*  Esri Tapestry Data Guide [see pages 14-16 LifeMode Group Descriptions]

See Table 5 for footnote explanations

Table 5: Example list of demographics, networks, connectors and conversation opportunities, channels and engagement opportunity

LOCAL DEMOGRAPHICS <small>*Esri Tapestry †Local Data</small>	COMMUNITY NETWORKS <small>Think of this as outreach beginning here</small>	NETWORK CONNECTORS	VENUE FOR CONVERSATION OPPORTUNITIES	COMMUNICATION CHANNELS
† Homeless (1)	Faith based groups	Sam (deacon of church with soup kitchen)	Church cafeteria	Phone and Email to Chris and his word of mouth/flyers to demographic
	ENGAGEMENT OPPORTUNITY Group dialogue/notes capture			
	<p>1. It may not be comfortable for vulnerable populations to be video or audio recorded. Consider using a notetaker to record what is heard. However, if appropriate, video can be a powerful way to share these stories among attendees and with the greater community.</p> <p>Use quick ways to capture information and think about how you can share that information later.</p> <p>Block parties can be used to gather video in an affinity group setting (creating comfort by bringing people that have something in common together).</p>			
† Chronic poverty/ low-income	Service Organizations	Sara (health dept. w/ school back pack program)	Back pack pick up event	Phone and Email to Sara and his word of mouth/flyers to demographic
	ENGAGEMENT OPPORTUNITY 30 second video capture, mural or quick survey. Block party			
† List of committees/ groups and issues or who they represent (2)	Town committees	Committee chairs, Town Clerk	Committee meetings	Town newsletter and website, email
	ENGAGEMENT OPPORTUNITY Group conversation			
	<p>2. It's useful to meet with these groups to gather their stories but also to listen for possible partnerships between groups or for supporting community values.</p>			
† School-aged youth (3)	Elementary, junior high/ middle school, high school	Principal, counselor, teachers, student council	Youth event/activity, school carnival, skate park, local diner or ice cream shop, downtown festival - i.e. movies in the park	Email and phone with Network Connectors and connecting with youth use Facebook, Friday folders, school newsletter
	ENGAGEMENT OPPORTUNITY Digital stories: Youth tell their story & collect community stories			
	<p>3. Remember to capture stories/input from hard to reach youth voices. It's easier to find the outgoing voices, but remember to dig deep and find missing voices specifically among youth. Remember to meet youth where they are - i.e. schools, local hangouts.</p>			
	<p>Parents</p> ENGAGEMENT OPPORTUNITY Group dialogue/story circle			
	<p>PTOs</p> ENGAGEMENT OPPORTUNITY (4) Photo contest, community meeting/dialogue follow-up. Youth friendly surveys. Senior citizen lunch with high school seniors. Murals with group dialogue, youth friendly surveys. Storytelling booth. Community video screening & dialogue. Activity booth at the market with video story collection, simple surveys. Group & individual conversations, translated survey materials			
	<p>4. Capture the data and stories and turn them into a compilation for the greater community to listen to.</p>			

Table 5 (continued): Example list of demographics, networks, connectors and conversation opportunities, channels and engagement opportunity

LOCAL DEMOGRAPHICS <small>*Esri Tapestry †Local Data</small>	COMMUNITY NETWORKS <small>Think of this as outreach beginning here</small>	NETWORK CONNECTORS	VENUE FOR CONVERSATION OPPORTUNITIES	COMMUNICATION CHANNELS
* Family Landscapes, * Barrios Urbanos (Hispanic population) (5)	Four Points Neighborhood	Celeste (local activist and pastor)	Local church, community center, park shelter	Neighborhood flyers, door to door personal invitations, word of mouth, A-Frame Signs at specific intersections, banners, local radio
ENGAGEMENT OPPORTUNITY Group & individual conversations, surveys, block parties				
5. Prepare translated materials, youth friendly events and preparation i.e. daycare or youth activities for input i.e. murals.				
† Military residents/ families (6)	Military service organizations	Jan (wounded warrior program), Tom (community center liaison for military men/women)	Local restaurant, community center, pub	Message through network connector via email, flyers, posters
ENGAGEMENT OPPORTUNITY Surveys, word of mouth, group dialogue, block parties				
6. Be sensitive to service members transitioning back into civilian life. Currently serving military men and women can feel like temporary members of the community.				
† Youth/young adults (18-25 yr)	coffee shops, pubs, laundromat, food delivery places	Social media	Downtown event, community activity	Word of mouth, smartphone messaging
† Long-time residents and newcomers	Farmers	Frank and Josie (old timer farm family)		Word of mouth, local paper
* Senior Styles (population over 65) (7)	Retirees/Seniors	Melissa (senior center coordinator), service providers	Community center, Mills Street market, block party, potluck	Word of mouth, banners, postcards, local paper, senior center newsletter
ENGAGEMENT OPPORTUNITY Group dialogue, individual interview, surveys				
7. Transportation to and from events or events planned at senior facilities				
† Non-English speaking (8)	ESL Center or service organization	Patsy (ESL Center coordinator), Hank (church group offering English classes)	Local library, restaurant, school, church	Flyers, word of mouth, email
ENGAGEMENT OPPORTUNITY Group dialogue, individual interview, potluck story circles, neighborhood meeting/conversation				
8. Create translated materials, google translation services aren't excellent but they'll get the job done.				

*  Esri Tapestry Data Guide [see pages 14-16 LifeMode Group Descriptions]

TIP from the Field

It's easy to get excited and try to use all your engagement methods, but be cautious of burning out from using multiple, possibly time intensive, methods that nonetheless keep reaching the same demographics. Be sure your outreach and engagement methods are appropriate for your audience. For example:

- One of our Heart & Soul towns, Cortez, CO, held a block party and potluck on 16 de Septiembre, Mexican Independence Day. Members of the Heart & Soul team gradually built trust with Hispanic residents by attending Sunday church services and building relationships with local pastors and priests. These people became the trusted connectors who could persuade Hispanic neighbors to participate in the Heart & Soul process.

Be approachable. What you wear, where you meet, and the tools you use can set the stage for how easy it is for disenfranchised and underrepresented residents to participate.

- One town worked with a local church deacon to connect with homeless residents, and then hosted a discussion with them on their hopes and concerns. By consciously bringing residents of similar circumstances and experiences together, the organizers made it far easier for these folks, unaccustomed to such gatherings, to relax, open up and share their stories. Surrounded by familiar faces they let down their guard.

Let your data help tell you when you need to do more outreach to specific groups.

- In several towns, as the Heart & Soul Team gathered data through storytelling efforts it learned that it had been collecting redundant data. That can be a good thing because it implies you've gathered enough data. BUT, it can also mean you're falling short on reaching representatives of all demographics. When reviewing the data, cross check what your network analysis revealed about who lives, works, and plays in your community. Even if fewer people participate, if they are more broadly representative you'll gather more valuable data and avoid gathering too much data from greater numbers of participants who nevertheless offer fewer perspectives.

There is no such thing as over tracking participation. There are many different entry points into your process and participation will span from light touch to deep engagement. Be sure you track what communication methods work and replicate those efforts.



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