

Community Heart & Soul™

— Guided by What Matters Most —

RESOURCE



For Heart & Soul Process Phase



Public Engagement Methods



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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

This Heart & Soul Guide to Public Engagement is intended for local governments and non-profit organizations working in partnership with residents in their community. Community Heart & Soul emphasizes that it takes **the whole community** to create a vision and take action, and that the community is everyone. While it isn't possible to literally reach everyone, Heart & Soul emphasizes the benefits of reaching every segment of your community, especially those who haven't been engaged in the past.

We've found that when people are given real ways to get involved and **see that they are being heard**, they are more likely to support the decisions that result and more likely to help take action.

Storytelling is the primary public engagement method for Community Heart & Soul and all the approaches here are intended to help you gather stories for the purpose of capturing information *and* to develop or strengthen connections of residents to each other and to your town. Stories are like the connective tissue of our past and future and to our hopes

and aspirations and by hearing from our fellow residents, we deepen our sense of connection to each other and strengthen our common cause – our community Heart & Soul.

Figuring out exactly *how* to engage your community can be daunting. No doubt there is some legacy of tense or yawn-inducing meetings, some difficult and divisive decision recently made, or a sense of apathy that you are not sure how to overcome. Heart & Soul was developed to overcome these obstacles! This guide outlines how you can think through an engagement program and offers a list of specific methods that have proven to be useful and meaningful.

If you're working on a Community Heart & Soul effort, use this guide to identify methods that will help you communicate with and engage the community through all phases of Heart & Soul. Even if you're not quite ready for a full-on Heart & Soul process, this resource can still be helpful in introducing new methods and tools for any outreach and public engagement effort.

What is Community Heart & Soul?

Community Heart & Soul is a highly participatory, collaborative, and strategic approach to community development and planning. It is 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. Read the Community Heart & Soul Field Guide to learn about this signature approach..

Heart & Soul Principles and Community Engagement

There are a handful of basic concepts that should guide your community engagement efforts. These concepts are recommended by the three principles of Heart & Soul: Involve Everyone, Focus on What Matters, and Play the Long Game. Include a balance of these basic concepts when you design your strategy and activities:

Involve Everyone

1. Hold events and broadcast information in the places where people already are: on the street, in the shops and restaurants, online and on Facebook, at standing meetings that are held by existing community organizations, at baseball games, in the schools, the laundromats, the farmer's markets.
2. Use existing networks, organizations, and known locations to connect with specific audiences.
3. Make each activity accessible. Provide childcare, shuttle services, and translators, for example.
4. Make the activities suitable for specific demographics and age groups.
5. Make the timing and location work for the people you want to reach.
6. Pay attention to who shows up, and pay even more attention to who doesn't show up.

Focus On What Matters

7. Find out what matters most to the community and use this to frame every conversation. (ps. that would be your community's Heart & Soul)
8. Participating is more compelling than 'being informed'. Providing information is important, but most people want to feel involved in a more active way. In each opportunity to connect with people, don't just 'inform' – always allow for some feedback or activity.
9. Use language that resonates with people, jargon and technical terms can be barriers to communicating with all your residents.

Play the Long Game

10. Always create opportunities to build capacity through training and cultivating new volunteers and leaders.
11. Always allow for relationship building, either as a purpose-built activity or part of a larger event –

sometimes this is as simple as allowing people to introduce themselves.

12. Always make sure that events are meaningful and interesting enough for participants to want to come back.
13. Make sure you are very transparent about the process, the feedback, and how people's participation will influence the decisions. Share what information you've gathered through your stories and compile them in ways that allows people to hear from each other.

There are lots of engagement guides that list hundreds of helpful, creative, and meaningful ways to involve your community in making decisions, but it can be pretty overwhelming to know where to begin. With the basic concepts outlined above in mind, there are three things to think about when developing an engagement plan: your **specific objectives for each phase** or task of the process; the **questions you want to answer**; and, your engagement **activities match the audience** you're trying to engage (refer to your Community Network Analysis). These are explained below.

Working Toward the Objectives of Each Phase

There are specific objectives for each phase of the Heart & Soul process and it's very important that you use your Community Network Analysis not only to build your outreach and engagement plans but to make sure you're hearing from missing voices in each phase.

Your engagement activities will help you through the Heart & Soul process by reaching missing voices and meeting the objectives below. Remember to set goals for engagement and establish a vision for each aspect of your Heart & Soul.

These are the public engagement objectives for each phase:

Phase 1. Lay the Groundwork

1. Understand who is in your community and who you want to reach, build relationships with people connected to missing groups and voices.
2. Find volunteers and resources to join the team or can help make your project happen as well as a project coordinator that keep efforts moving along.

3. Build excitement and awareness for the project and start gathering early input about your town's Heart & Soul.
4. Develop an identity and brand for your project that people can recognize and associate efforts to the Heart & Soul process.

Phase 2. Explore Your Community

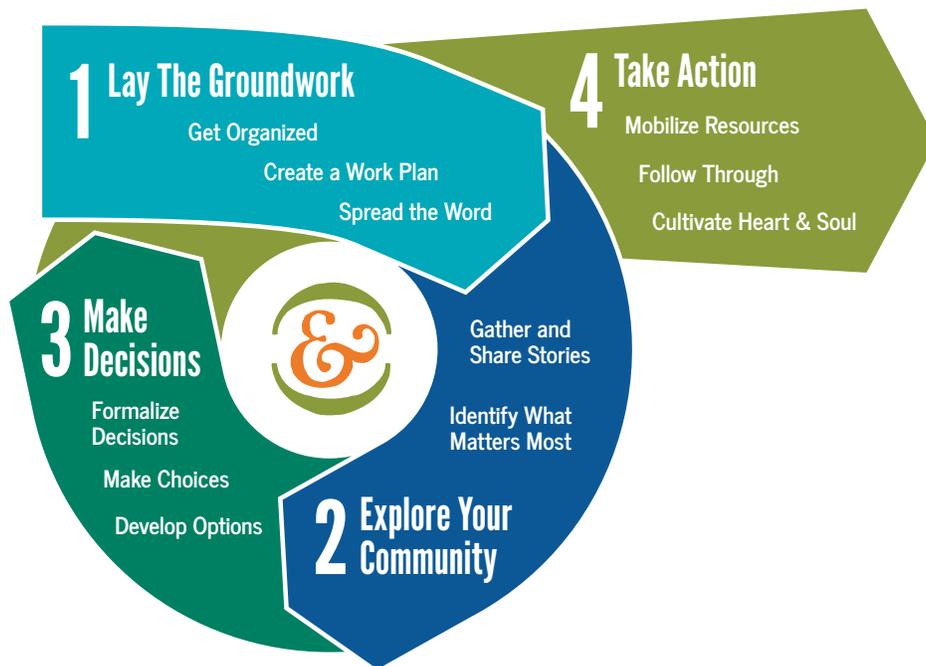
5. Build on your team so its demographics mirror and/or reach missing voices in the community.
6. Gather and listen to stories, build relationships in the community and capture common cause.
7. Bring the community along with identifying and confirming the community's Heart & Soul.
8. Early partnership development.
9. Celebrate.

Phase 3. Make Decisions

10. Understand and explain your Heart & Soul as it relates to local and national trends.
11. Listen for and brainstorm with the community for ideas that will improve or preserve your Heart & Soul.
12. Strategize and select actions.
13. Nurture partnerships for action.

Phase 4. Take Action

14. Gather resources and commitments for taking action.
15. Prepare for future community conversations to maintain progress on your Heart & Soul.
16. Parlay the Heart & Soul experience into other efforts.



Asking the Right Questions

When thinking through your engagement plans, there are all kinds of techniques, tools, questions, and activities you can bring into any particular event. For anyone who is just doing this for the first time, you should know that **the most important thing is to ask good questions and listen to the answers.** You often need to provide some context or information, so that people can answer your questions with

more insight. If you have some good questions, it's really just a matter of getting people to answer them. This means you have to find those people and create the right situation for them to be able to respond.

Some simple starter questions you can ask during each phase are provided on the following page.

OBJECTIVES

QUESTIONS TO ASK

<p>Phase 1 Lay the Groundwork</p>	<p>Understand who is in your community and who you want to reach, build relationships with people connected to missing groups and voices.</p> <p>Find volunteers and resources to join the team or can help make your project happen as well as a project coordinator that keep efforts moving along.</p> <p>Build excitement and awareness for the project and start gathering early input about your town's Heart & Soul.</p> <p>Develop an identity and brand for your project that people can recognize and associate efforts to the Heart & Soul process.</p>	<p>People initially interested in Heart & Soul and later the Heart & Soul Team asks themselves:</p> <ul style="list-style-type: none"> • Why are we doing this? • Has anything like this been tried before? • Who lives here? • What are the demographics of our community that need representation on our team? • Who should be involved in this process? • How do people learn about what's happening here? • Who wants to help? • What kind of challenges or obstacles should we expect? • What groups exist that we can present this idea to for early support?
<p>Phase 2 Explore Your Community</p>	<p>Build on your team so its demographics mirror and/or reach missing voices in the community.</p> <p>Gather and listen to stories, build relationships in the community and capture common cause.</p> <p>Bring the community along with identifying and confirming the community's Heart & Soul.</p> <p>Early partnership development.</p> <p>Celebrate.</p>	<p>Questions the Heart & Soul Team will ask the community:</p> <ul style="list-style-type: none"> • What do you like about living here? • In what ways do you feel connected to this community? • What is happening here that is working well? • What would you like to see change? • What would you like to keep the same? • What is your one wish for this community? • We heard that these are the things that are important to this community, does this sound right? Did we miss anything? • If we work to improve or protect each of these things, how do you imagine them in the future?
<p>Phase 3 Make Decisions</p>	<p>Understand and explain your Heart & Soul as it relates to local and national trends.</p> <p>Listen for and brainstorm with the community for ideas that will improve or preserve your Heart & Soul.</p> <p>Strategize and select actions.</p> <p>Nurture partnerships for action.</p>	<p>Questions the Heart & Soul Team will ask the community:</p> <ul style="list-style-type: none"> • How is our Heart & Soul changing? • Were they better or worse in the past? • What will happen to them if we do nothing? • What can we do to protect or improve them? • Of those ideas, which are possible and which should we prioritize? • Which idea will have the biggest impact? • Which idea has a champion who will implement it? • Given this particular situation, which option will have the best impact on our Heart & Soul? • Who can help move action ideas forward?
<p>Phase 4 Take Action</p>	<p>Gather resources and commitments for taking action.</p> <p>Prepare for future community conversations to maintain progress on your Heart & Soul.</p> <p>Parlay the Heart & Soul experience into other efforts.</p> <p>Establish a stewardship team that can champion your Heart & Soul.</p>	<p>Questions the Heart & Soul Team will ask the community:</p> <ul style="list-style-type: none"> • Who will do what and when? • What have we learned, how can we pass on this learning? • How will we share out progress on our Heart & Soul?

Choosing the Approach

With some good questions ready to go, there are essentially four approaches for connecting with people and asking them for answers:

1. Use the grapevine;
2. Hit the streets;
3. Go to where people already are;
4. Call an assembly.

Each of these approaches suit a certain set of capabilities and offer specific opportunities for engagement. On the ground, a good engagement process actually uses each of these in combination, delivering the same questions via multiple channels, or using the simpler and more creative tactics to drum up interest in the bigger ticket activities.

Each approach has opportunity for thin or thick engagement. Thin engagement is quick, gathers information from stories to be “listened” to later. Thick engagement allows residents to listen in person (or via recorded options later); this is extremely important in bridging divides and allowing compassion to grow in the community. You’ll want to apply both thin and thick engagement to your Heart & Soul effort because everyone in your community will have a different way they’ll feel comfortable sharing their stories.

Be sure to honor all stories by listening to them for valuable information contained in them (see our [Making Meaning from Qualitative Data](#) resource). Hint: the more you allow the community to see and hear each other’s stories the more relationships you’ll create and the more trust will spread. Use this insight as you apply the engagement approaches below.

1. Use the grapevine

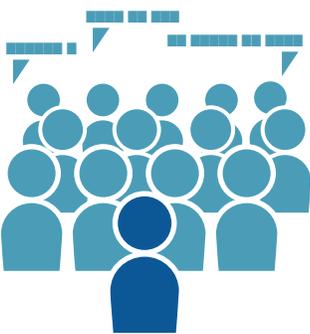
You can use your volunteers as ambassadors to their family, neighbors, and other organizations. If ten volunteers each reach out to ten people, then you will have connected with one hundred people. Many Heart & Soul projects begin like this, with volunteers conducting interviews and presenting to the clubs they belong to. Some volunteers will agree to host a small meeting with their friends or neighbors at their home. Asking people to spend time with others in this setting allows for very meaningful conversations and provides a lot of valuable insight. This is true even when your volunteers meet with people they already know well.

In any of these situations, your job would be to provide the materials (description of what Community Heart & Soul is to your community, a questionnaire, a presentation) and the support (training, preparation) needed so that the volunteers can deliver the activity in a consistent and positive way.

Why would you use ‘the grapevine’?

- When you are trying to reach specific groups via specific people.
- When you are getting started and trying to build an audience and build trust in the process.
- When your audience will be more candid and comfortable in this setting.
- When you don’t have the funds or resources to organize a big event.

Thin Engagement



More intention needed to share what was heard (surveys, 30 second interviews, etc.)



Capture what is heard in all approaches and share it back out with the greater community to build trust

Thick Engagement



Opportunity for hearing first hand, face-to-face relationship development (story listening, group storytelling, etc.)

2. Hit the streets

There are hundreds of creative ways to reach the public out in public or in regular haunts such as cafes, diners, or pubs. This can include tabling on the sidewalk or at the football game, entering the chili contest, putting up flyers around town, or setting up a pop up store or a pop up park. Marketing people would call this ‘guerilla marketing’. This can also include the virtual public: online surveys, Facebook pages, web forums, etc. Most of these activities allow you to promote the project, build good will, and collect fairly simple feedback. On-the-street questions typically seek short answers: What do you love about *Gardiner*? What makes *Golden* a great place to live? Laconia placed drink coasters with the question “How would you re-imagine Laconia?” in local restaurants, resulting in hundreds of responses. North Fork Valley, Colorado used coasters and created their own locally made Lovett or Leave It beer (that even won a best pale ale award!).

Why would you ‘hit the streets’?

- When you are drumming up interest in the project (or the next phase of the project).
- When you want to send the message that this is a different kind of project; that you want to hear from new people, and that you are not operating behind closed doors at City Hall.
- When you are trying to reach ‘regular’ folks or get a random sample of people.
- When you are trying to reach certain groups in the places where you will find them. (Main Street, the High School, the July 4th parade, etc.)

3. Piggyback on existing events and groups

Every community has existing clubs and organizations with regular meetings, as well as annual festivals and events. Rather than inventing something new, you can bring your activities to these places. Do a presentation and a simple activity at the Rotary Club’s monthly meeting or at Bingo night, or set up a table at the parade or Farmer’s market. These activities are similar to ‘hitting the streets’ activities – the focus is on drumming up interest, recruiting volunteers, and asking fairly easy questions.

When would I choose to piggyback on existing events?

- When you know lots of people will be there.
- When you want to connect with people who would be at that event.
- When organizing your own event is too much work or not necessary.

4. Call an assembly

Organizing a big public event requires a bigger effort but is eventually necessary for most Heart & Soul projects. Whether they are action summits, block parties, idea fairs, volunteer appreciation parties, discussion forums, focus groups, or story listening sessions, these meetings are the moments when members of the community gather to meet each other, discuss key questions, and provide recommendations to help you move forward with your efforts. This is your chance to gather insights, confirm your conclusions, get new ideas, or unravel an important issue. Sometimes a series of smaller meetings – such as the neighborhood meetings in Cortez, Colorado – can serve the same purpose as a single larger meeting or as a follow up from a large community event when you observe specific demographic groups aren’t in attendance.

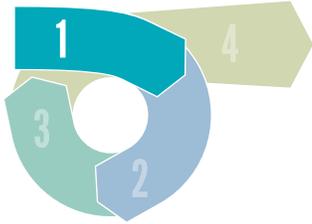
When would you choose to call an assembly?

- When you really need participants to focus on specific questions, have deeper conversations, build relationships, make decisions, and offer meaningful feedback.
- When you need to distinguish what you are doing from what other groups are doing.

We have some suggestions for engagement tools in this document and for a fuller list of ideas for the above approaches, look at page 126 or Appendix 4 of [Planning for Community Heart and Soul](#).

Putting It Together Phase By Phase

Now you have the framework of objectives, questions, and approaches to help plan your community engagement efforts. How do you put all this together? Like any strategic process, you have to choose your actions carefully based on available resources, timing, costs, and benefits. It can be helpful to outline the ‘blue sky’ process as if you had all the time, money, and people power in the world, and then pare it down to the essentials. Here are the objectives and questions again, with some activities that you could consider for each phase:



Phase 1: Lay the Groundwork

Objectives

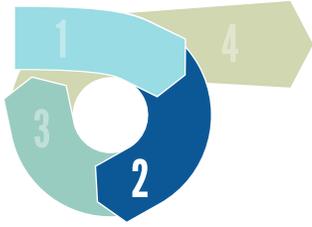
- Understand who is in your community and who you want to reach, build relationships with people connected to missing groups and voices.

- Find volunteers and resources to join the team or can help make your project happen as well as a project coordinator that keep efforts moving along.
- Build excitement and awareness for the project and start gathering early input about your town’s Heart & Soul.
- Develop an identity and brand for your project that people can recognize and associate efforts to the Heart & Soul process.

Questions

- Why are we doing this?
- Has anything like this been tried before?
- Who lives here?
- Who should be involved in this process?
- How do people learn about what’s happening here?
- Who wants to help?
- What kind of challenges or obstacles should we expect?

	APPROACH	ACTIVITIES
Phase 1 Lay the Groundwork	Use the grapevine	Chat ‘n Chew: Have lunch or coffee with people who can advise you about your project ideas or to build relationships with people you may want on your Heart & Soul Team. Focus on finding strategic partners and volunteers that can connect you with missing voices and/or that can help champion the effort.
	Hit the streets	<p>Flyers: Put up posters around town inviting people to volunteer for your project.</p> <p>Window graffiti: Use empty space on store fronts to write about Heart & Soul, use this method in Phase 2 to capture stories and Phase 3 to vet ideas for action.*</p> <p>Online forums: Send the same message out on local online forums or email lists.</p> <p>* HINT: Build on your skills by using some activities throughout each phase. This consistency will also help residents know what to look for throughout the community.</p>
	Piggyback	Roadshow: Bring flyers or a presentation to the regular meetings of community organizations. Focus on recruiting volunteers
	Call an assembly	Heart & Soul Team meeting: Start meeting regularly with the project partners and volunteers. Focus on project goals, resourcing, organization, and strategy.



Phase 2: Explore Your Community

Objectives

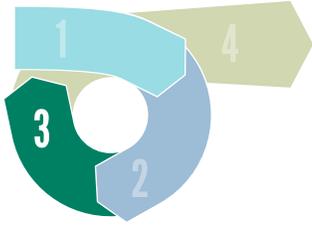
- Build on your team so its demographics mirror and/or reach missing voices in the community.
- Gather and listen to stories, build relationships in the community and capture common cause.
- Bring the community along with identifying and confirming the community’s Heart & Soul.

- Early partnership development.
- Celebrate.

Questions

- What do you like about living here?
- In what ways do you feel connected to this community?
- What is happening here that is working well?
- What would you like to see change?
- What would you like to keep the same?
- What is your one wish for this community?
- We heard that these are the things that are important to this community, does this sound right? Did we miss anything?
- If we work to improve or protect each of these things, how do you imagine them in the future?

APPROACH	ACTIVITIES	
Phase 2 Explore Your Community	Use the grapevine	<p>Interviews: Recruit and train volunteers to interview 5 people each. The interviews can be open-ended questions focused on what’s important to them and their stories.</p> <p>Ambassadors: If you have a survey or upcoming event, ask project team members to speak about the project within their networks – service clubs, boards, classrooms, etc.</p> <p>Meeting in a box: Invite people to host a meeting of friends and neighbors in their home, or colleagues at work. Provide a kit of meeting materials (good questions) and focus on what matters most to the community, stories, hopes, concerns, and assets.</p>
	Hit the streets	<p>Text poll: Set up a phone number to receive SMS messages, post this on flyers with a good question.</p> <p>Online/paper survey: Distribute a questionnaire asking people what matters most to them. Consider doing a survey at the local high school and ask the youth how they’d like to be more involved with the community (see sample survey).</p> <p>Pop-ups: Set up a table with information, a survey, and a fun activity in: a parking space turned into a park, the farmer’s market, a downtown parking lot, the mall, the high school, etc</p> <p>Walk ‘n’ Roll tours: Invite people to explore the community together on a group tour. This could include observational activities and visioning activities.</p>
	Piggyback	<p>Roadshow: Bring flyers, a presentation, and a simple activity to the regular meetings of community organizations. Focus on recruiting help, promoting upcoming events, and conducting simple engagement activities.</p> <p>Tabling: Set up a table at homecoming, parades, local conferences, etc.</p>
	Call an assembly	<p>Storytelling forum: Invite all-comers to an evening of sharing stories, learning from each other, and discovering Heart & Soul, values and aspirations.</p> <p>Vision forum: Invite all-comers to a working forum where people can discuss issues, brainstorm solutions, review findings about what the community values, and talk about goals and aspirations.</p> <p>Community Resource Fair: Organize an exhibition of local non-profits and service groups to share their work and recruit volunteers, combined with discussion or feedback activities about what your town’s Heart & Soul is, a big meal, raffles, etc.</p>



Phase 3: Make Decisions

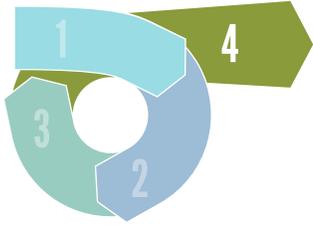
Objectives

- Understand and explain your Heart & Soul as it relates to local and national trends.
- Listen for and brainstorm with the community for ideas that will improve or preserve your Heart & Soul.
- Strategize and select actions.
- Nurture partnerships for action

Questions

- How is what the community values about its Heart & Soul changing?
- Were they better or worse in the past? What happened, what changed?
- What will happen to them if we do nothing / continue to do what we are doing now?
- What can we do to protect or improve them?
- Of those ideas, which are possible and which should we prioritize?
- Which idea will have the biggest impact?
- Which idea has a champion who will implement it?
- Given this particular situation, which option will have the best impact on our Heart & Soul?

	APPROACH	ACTIVITIES
Phase 3 Make Decisions	Use the grapevine	<p>Ambassadors: If you have a progress report, new survey or upcoming event, ask project team members to speak about the project within their networks – service clubs, boards, classrooms, etc.</p> <p>Interviews: Ask your team members to meet with targeted individuals – stakeholders, experts, gatekeepers, missing voices, etc – to have a focused conversation about issues and potential solutions.</p>
	Hit the streets	<p>Text poll: Set up a new text poll to distribute via emails, social media, and flyers. Focus on action ideas or action priorities.</p> <p>Online/paper survey: A survey during this phase would focus on finding ideas for advancing the community's Heart & Soul or on prioritizing actions.</p> <p>Pop-ups: Set up a table with new information, a survey, and a fun activity in: a parking space turned into a park, the farmer's market, a downtown parking lot, the mall, the high school, etc</p> <p>Walk 'n' Roll tours: Invite people to explore the community using community Heart & Soul as a lens for assessment and generating action ideas.</p>
	Piggyback	<p>Roadshow: Bring flyers, a presentation, and a simple activity to the regular meetings of community organizations. Focus on asking for solutions to specific issues that would be relevant to each group.</p> <p>Tax bills: If you are allowed to, add a postcard with project information to the town's tax bill mailing.</p> <p>Contact lists: Send email updates with links to surveys etc via established groups' contact lists.</p>
	Call an assembly	<p>Action Summit: Ask all-comers to attend an action planning summit. Ask participants to generate action ideas, evaluate the feasibility and Heart & Soul value-benefits of the ideas, and prioritize them.</p> <p>Focus Groups: Convene meetings to focus on specific Heart & Soul statements or questions, share information, collect ideas and preferences or questions.</p> <p>Design Workshop (Charrette): Organize a collaborative brainstorming, land use planning, and design ideas session.</p>



Phase 4: Take Action

Objectives

- Gather resources and commitments for taking action.
- Prepare for future community conversations to maintain progress on your Heart & Soul.

- Parlay the Heart & Soul experience into other efforts.
- Establish a stewardship team that can champion your Heart & Soul

Questions

- Who will do what and when?
- What have we learned, how can we pass on this learning?
- How will we share out progress on our Heart & Soul?

	APPROACH	ACTIVITIES
Phase 4 Take Action	Use the grapevine	Ambassadors: Develop a presentation about the project and lessons learned, ask your volunteers to present at conferences and to their colleagues and other organizations.
	Hit the streets	Parade: Enter a float in the parade, recognize and celebrate your volunteers.
	Piggyback	Roadshow: Present the results of the project and action plans to other organizations.
	Call an assembly	<p>Appreciation Party: Hold a celebration to honor individual volunteers and organizations for helping with the project and/or for championing some new action idea.</p> <p>Get It Done Party: Launch the action phase by organizing a volunteer day. Take on the low-hanging fruit projects.</p>

Making the Plan Workable

The timing and resourcing of activities is the final ‘feasibility’ piece of an engagement strategy. It’s good to start out with a big plan and great ideas, but resourcing all those ideas and pacing yourself with the right timing is the key to staying sane and being successful.

Resourcing refers to all the material, financial, and human resources you need to deliver your engagement activities. This includes professional consultants sometimes, trained volunteers, materials, space, food, technical know-how, etc. Is there a local group that would want to organize and cosponsor an event with you? Is there a school group or teacher who would take on some aspect of the outreach work as a classroom project? Are there any state or regional programs offering trainings or other support? Given these answers, can you modify your ideas to suit your own needs as well as the interests of these partners?

On the other hand, do you need to simplify your plans and eliminate some activities? Are there any activities that you’ve imagined that can be streamlined by using the same materials from another effort? One of the best ways to streamline your work is to create a kit of tools that can be deployed in multiple ways: a survey or questionnaire can be put online, stacked up at the library, delivered from a table at the farmer’s market, and completed with keypad polling at a presentation.

Audience refers to who you’re trying to reach, your community network analysis will help you know who missing voices are and potential ways to reach them.

Timing of course is also critical. It is very disappointing to plan a big event and have no one show up. When are people around? When are they likely to have time to pay attention to this process? What else is going on that you should either piggyback off of or avoid? Two typical times to steer around are summer vacation and winter holidays – this could be busy times to compete with. In some places you steer around hunting season, and in others you steer around election season.

Unless your team is full of expert organizers, it’s also not easy to plan two big events back to back. You need time to review the feedback and plan the next event, usually a few months at least. Given all this and the seasonal considerations, you should expect to host three or four ‘big events’ per year, with lots of little activities spread around in between.

Appendix A

Here's a sample Phase-by-Phase work plan for project tasks and engagement activities with a project focused aimed at

using Heart & Soul to update their land use documents as well as integrating H&S in other facets of the community.

TASK	YEAR 1												YEAR 2											
	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12			
1	1. Project Setup	█	█	█																				
	2. Heart & Soul team Kickoff		*																					
	3. Develop Engagement/ Communication Plans		█	█																				
	4. Comm Materials Developed		█	█																				
	5. H&S Pre-launch			*																				
	6. Share what H&S is blanket the community, grapevine, hitting the streets, piggy back		█	█	█																			
2	7. Pull data from stories			█	█	█	█	█	█	█	█	█	█											
	8. Training on messaging		*																					
	9. Engagement #1 – Stories, hitting the streets, call an assembly (formal launch of the project)			█	*	█	█	█	█															
	10. H&S mid-phase review					*																		
	11. Results						█	█	█															
	12. Summit: Heart & Soul review of what's heard								*															
	13. Draft Profile/H&S themes, team reviews					█	█	█	█	*	█	█												
	14. Engagement #2 – H&S statement review, call an assembly, hitting the streets, assess how people heard about the event										█	*	█	█										
	15. Team reviews final H&S statements												*											
	16. Final Profile/H&S												█	█										
	17. Transition Activities												█	█										
	18. Planning Board adopts H&S statements												█	█										
3	19. Identify Land Use Issues, local and national trends related to H&S											*												
	20. Training: Decisions											█	█											
	21. Engagement #3 – Land Use ideas, hitting the streets, call an assembly			█	█	█	█	█	█				█	█	█									
	22. Land Use Options									█	█	█	█	█	█	█								
	23. Land Use – draft									█	█	█	█	█	*	█								
	24. H&S team – Land Use Options prepped for community review															*								
	25. Engagement #4 - Land Use Options review, hitting the streets, call an assembly														█	*	█	█						
	26. H&S team– document final recommendations																		*					
	27. Land Use – Final																			█	█			
	28. Planning Board Adoption of Heart & Soul statements																			█	█			
4	29. Transition to stewardship team																		█	*	█	*		

- * Heart & Soul Team meeting
- █ Indicates community engagement effort

Appendix B

Sample products with engagement

	HEART & SOUL TASK	PUBLIC FEEDBACK LOOP	ENGAGEMENT APPROACH (see Choosing the Right Approach page 5)	PRODUCTS
Phase 1	Spread the Word	Promote the Heart & Soul effort and listen for early feedback.	Promote H&S with approach 1, 2, & 3.	Implementation plan, community report card, success stories, new processes.
	Gather stories	Community listens to stories	Gather stories using all 4 approaches.	Data organized in master workbook
Phase 2	Identify Community Heart & Soul Themes	Did we hear your stories correctly?	Public review, comment & approval of themes, using all 4 approaches.	Public feedback summaries & draft themes.
	Create Heart & Soul Statements	Did we get the Heart & Soul statements right? Validate the statements.	Public review/development, comment & approval of statements, using 4 then validate with 1, 2, and 3.	Draft and Final Heart & Soul statements, possible formal adoption by local board
Phase 3	Understand and explain your Heart & Soul as it relates to local and	If this is what we care about, how are we doing? What is happening in our community?	Public discussions that allow for people to connect Heart & Soul to community trends & drivers, with approach 3 & 4.	Summary of issues heard during story phase, meeting summaries, trend reports.
	Develop Resident Recommendations	If this is what we care about, what should we continue doing that we are doing well? What should we be doing that we are not doing?	Public discussions that allow for people to collectively craft citizen recommendations for desired action, with 4.	Meeting summaries & draft recommendations.
	Evaluate Recommendations Using Heart & Soul as the Base Criteria	Given limited resources, what are the most important recommendations that can be done in the short-mid-term?	Public process to use Heart & Soul to evaluate actions and strategies, with 3 & 4.	Prioritized list of strategies and an Action Plan.
	Final H&S "Plan"	Something formal or informal that sparks action and keeps Heart & Soul front and center and honors the community	Public discussions that allow people to see the connection between Heart & Soul and action, with all 4 approaches.	Community Plan, video, and storybook that honors the process, etc.
Phase 4	Stewardship of H&S	More communication & outreach on what is happening and what is being done.	Networking and pitch event to connect organizations with identified actions, with 3 & 4.	Implementation plan, community report card, success stories, new processes.

Appendix C: Match Game – Public Engagement Activities

This appendix contains:

1. Match Game—Public Engagement Activities sample activity for your Heart & Soul team to identify engagement
2. Public Engagement Tasks by Phase Chart (3' x 4')
3. Engagement Activity Cards

Match Game – Public Engagement Activities

Facilitator Guide

Total time: 75 minutes

Set-up

- Round tables with 5-6 chairs per table
- Give each table a set of Engagement Activity Cards (see pages 25-35 for the cards) with some kind of adhesive that is easy to remove and re-stick
- 3'x4' Public Engagement Tasks by Phase Chart on wall – blank table with engagement tasks down left column, phases across top
- Sticky notes
- Flip charts
- Pens

Instructions to participants (8 minutes):

- We are going to play a match game of sorts to begin to formulate your public engagement plan. Your plan will not be completed today, and even when your plan is complete, you may choose to adjust as you move through the process. Your plan should give you a general idea of what kinds of activities will work in your community to engage the public for each public engagement task, with an emphasis on reaching missing voices and building relationships. **(Refer to the engagement tasks chart.)** Today, you should walk away with a few great ideas and an understanding of the things you should be considering as you finish your engagement plan.
- Take 5 minutes to find the engagement activities that you think will work well in your community (hopefully you read the handout we sent in advance as well to familiarize yourself with what's on these cards) and share them with

your neighbor – let us know if you have questions (**trainers float around room**). Please note that this is not an exhaustive list of public engagement strategies. You may have an idea that is completely new or that we haven't heard of. Write them down on the blank cards to include in the mix.

- We will play several rounds of the game. During each round, you have 5-10 minutes (depending on the round) to lay out all of the activities that you are interested in for each phase.
- Questions about these instructions?

ROUND 1: Activities Cover All Tasks in Each Phase (22 minutes)

Steps

1. Your first job is to match the types of activities that you think will work for your community with the public engagement tasks that are needed in each phase. Most of these will take place in phases 2-3.
2. Take 10 minutes to organize your preferred methods. Stick them to the engagement tasks chart on wall where you think they would work best. Remember, you can use multiple activities to complete each task. For instance, to gather what matters most you might want to begin gathering stories in phase 1 at a community dinner where you announce your H&S effort and have an idea wall somewhere in the room. Then in phase 2, you might want to do a travelling story booth, story wall at the grocery store, and focus groups with target audiences. Also, you may want to use one type of activity at different times in the process, such as a community forum to develop goals and another one later to evaluate action ideas. If this is the case, just take a blank card and write the name of the activity type on it, so you can have two community forum cards to put in different places. Make sense?
3. In large group, review and debrief results. (10 minutes)

Debrief questions

- What attracted you to these methods? What makes them work well for your town? (Record on flip chart)

ROUND 2: Match to Target Audiences (15 minutes)

Step

1. Now, remembering that you will be focusing your energy on reaching missing voices, let's take a look at how your ideas will work for reach your target audiences. You identified... **(Review target audiences identified earlier as part of the community network analysis (generally, discuss by formal/informal/unorganized groups) – invite additional considerations from participants and record on flip chart.)** (3 minutes)
 - a. Youth: social media
 - b. Parents of young children: fun family opportunities, child care
 - c. Unorganized groups: door to door
 - d. Etc.
2. Review the activities on the wall. Consider: How well will they work for reaching your target audiences? Can you adapt them to reach your target audiences? Are there other activities that you can/should add to specially reach those voices? Take 5 minutes to review and adjust your activities on the wall – add, subtract, modify at least 1 activity to reach a target audience. (5 minutes)
3. In large group, review and debrief results. (7 minutes)

Debrief questions

- What changes did you make?
- Why did you make them – what were your assumptions? (Record on flip chart)
- Is there more information that you need to pick the activities that are most likely to help you reach your target audiences? (Record on flip chart)

ROUND 3: Enhance Activities with Relationship-Building Efforts (15 minutes)

Steps

1. You should strive to include relationship-building in every engagement activity you choose. At your tables, I want you to explore how you can enhance your activities with relationship-building in mind. You may look for opportunities to have different groups hear each other's experiences and perspectives. **(Assign each table a different activity – give them different kinds of activities, including one with limited relationship-building opportunities.)** (2 minutes)
2. Discuss everyone's ideas at the table. Take sticky notes and write down your relationship-building ideas and stick them to your activity card on the wall. (5 minutes)
3. Report out and discussion. (8 minutes)

Report out

- What kinds of relationship-building ideas did you have for your activity?
- What specific relationships were you trying to build? (Record on flip chart)

Final Discussion: Matching Activities to Time and Budget Constraints (15 minutes)

Discussion points

- We will wrap up this game with a final discussion about the other factors we talked about earlier: timing and cost.
- First timing: **In large group, discuss approximate dates (month/year) for each phase and write on engagement tasks chart. (2 minutes)**
- Discuss: What major events are happening in your town during each phase? Is there a benefit to linking your engagement activities to these events? Does that change what you think you should do to accomplish that task? Review a few examples on the engagement tasks chart, e.g. if want to collect action ideas beginning in December, could you conduct any activities at the big Christmas open house, perhaps an idea wall? Do this instead of or in addition to other activities? Don't forget to think about the impact on your engagement with target audiences. (3 minutes)
- Now, let's look at budget: We aren't going to crunch numbers, but you should – at least with decent estimates. Whoever is working on that can contact us directly if you have questions about making these estimates. For now, let's look at the very real possibility that your ideal engagement plan is too expensive. If that's the case, before eliminating activities, look for ways to reduce the cost or to get additional funding.
- Take the activity you were looking at before when we were talking about relationship-building. At your table, explore how you can keep costs down by getting in-kind resources/services (donated meeting space or chairs, potluck instead of catered event, etc.) or seek additional funding for specific activities, like a small grant from your local bank to fund a large community event. (5 minutes)
- Report out, summarize and close. (5 minutes)

PUBLIC ENGAGEMENT TASKS BY PHASE

	Gather Stories	Harvest H&S data	Verify H&S	Gather hopes/ concerns	Develop goals	Verify goals	Gather action ideas	Evaluate action ideas	Prioritize action ideas	Verify plan	Celebrate
Target Audiences	Phase 1	Phase 2	Phase 2	Phase 2	Phase 2	Phase 2	Phase 3	Phase 3	Phase 3	Phase 3	Phase 1
	Phase 2										Phase 2
			Phase 3								
		Phase 4									



"30-Second" Interview

Block Party

Celebratory Events

Change Over Time

Description: Block parties are primarily relationship-building events. Block parties create a fun atmosphere for people to connect with their neighbors, and they appeal to people of all ages but are particularly effective at engaging families with young children. Combined with other methods, block parties can become a forum for deepening community engagement.

Phases: 2-3

Tasks: Gather stories, including values, hopes/concerns, action ideas; Verify Heart & Soul, hopes/concerns, action ideas; Celebrate

Audience: General public, but some communities may be able to target specific audiences based on neighborhood demographics

Cost: Medium

Timing: Best in spring, summer and early fall

Heart & Soul Communities: Golden, CO; Victor, ID; Essex, VT; Gardiner, ME; Cortez, CO; North Fork Valley, CO; Polson, MT

Description: Change Over Time engages the public in validating community Heart & Soul, describing how it shows up in the community, and understanding what positively or negatively affects your H&S. This can be used in large groups with keypad polling or in a series of small group conversations. Change Over Time asks participants to identify ways a Heart & Soul theme has shown up or could show up in the community looking at distinct timeframes—20 years ago, present, 20 years from now.

Phases: 2-3

Tasks: Strategize (develop goals, evaluate action ideas)

Audience: General public

Cost: Cost varies

Timing: Any time of year, but consider conflicts

Heart & Soul Communities: North Fork Valley, CO; Gardiner, ME

Description: 30-second interviews—also referred to as intercept or person-on-the-street interviews—are used for gathering feedback from the general public. In this approach, volunteers stand at high traffic areas to gather quick opinions on or reactions to your community Heart & Soul statements, goals, or action ideas. These could be done at local fairs, movies in the park, etc. with someone just walking through the crowds wearing a Heart & Soul t-shirt and sharing printed information about the process.

Phases: 2-3

Tasks: Gather stories, including values, hopes/concerns, action ideas

Audience: General public

Cost: Low

Timing: Avoid harsh weather months if conducted in an outdoor area

Heart & Soul Communities: Essex, VT

Description: Celebrating with your community at key milestones is recommended, especially at the close of Phase 4. Your celebration may be a stand-alone event like a large community potluck or done as a part of an existing community event. At these events, you can recognize volunteers for their hard work, share information about your achievements and what's next, and gather any additional information you need, depending on where you are in the process.

Phases: 1-4

Tasks: Gather stories, including values, hopes/concerns, action ideas; Implement

Audience: General public

Cost: Cost varies

Timing: Any time of year, but consider conflicts and weather

Heart & Soul Communities: Essex, VT; Cortez, CO

Print this page and the following page double-sided and cut out to create four cards. Use short-edge binding so the text is oriented the same way on the front and back of each card.



Comment Card

Community Art Projects

Community Conversations

Community Summit

Description: Community art projects are a way to gather information by drawing out the creative talents and abilities of people in your community. It works well for engaging the elderly and youth, as well as those that are new to public processes. These projects can take many forms—photo collages, drawing, painting, theater, photography, and video. Multimedia art can also be used to share information in new ways—some people in your community will be more interested in experiencing information through art than through a 30-page report.

Phases: 2

Tasks: Gather stories, including values, hopes/concerns

Audience: General public, or designed to target specific audiences

Cost: Cost varies, but typically low

Timing: Avoid harsh weather months if created in outdoor spaces

Heart & Soul Communities: North Fork Valley, CO; Golden, CO; Essex, VT

Description: A community summit is a community-wide event with a set agenda that can serve a variety of engagement purposes. Summits generally integrate group dialogue methods into the agenda, allowing time for attendees to provide feedback or contribute to decision-making processes. Keypad polling, providing instant results for all attendees, can be used at these events – a great tool for sparking conversation, affirming goals or evaluating options and prioritizing action items.

Phases: 1-3

Tasks: Gather stories, including values, hopes/concerns, action ideas; Verify goals; Strategize (evaluate and/or prioritize action items)

Audience: General public, with special attention to missing voices

Cost: Medium to high

Timing: Any time of year, but consider conflicts

Heart & Soul Communities: North Fork Valley, CO; Gardiner, ME; Cortez, CO; Polson, MT

Description: Comment cards are used for gathering written public information/feedback. Cards include a prompt or question for people to respond to. Comment cards can be tailored to a variety of contexts. Take cards to the places where people in your community congregate—the local diner, neighborhood market, public library, or even a popular brew pub. This method is particularly effective for engaging busy people who are unlikely to come to public meetings. Hanging them where others can read them is a light touch way of incorporating relationship development with this method.

Phases: 2-3

Tasks: Gather stories, including values, hopes/concerns, action ideas; Verify Heart & Soul, goals, action ideas

Audience: General public

Cost: Medium

Timing: Any time of year

Heart & Soul Communities: North Fork Valley, CO; Laconia, NH

Description: Community conversations are single events similar to focus groups in that they are small group discussions, but they are usually done with an open invitation to the community rather than targeting a specific group. These may be done in people's living rooms, in a quiet coffee shop, or in a library meeting room. Wherever they are held, make it a comfortable environment, while facilitating a structured conversation to gather information, examine existing conditions and develop goals, or gather action ideas.

Phases: 2-3

Tasks: Gather stories, including values, hopes/concerns, action ideas; Strategize (evaluate selected action ideas)

Audience: General public, or designed to target specific audiences by holding them in strategic locations

Cost: Low

Timing: Any time of year

Heart & Soul Communities: North Fork Valley, CO (Slice of the Pie)



Digital Storytelling

Event Booth

Focus Group

Heart & Soul Resource Fair

Description: Many Heart & Soul towns have leveraged community festivals, fairs, and markets to introduce their Heart & Soul efforts. Event booths are a chance to share information about Heart & Soul, but you can also easily turn your table into an interactive activity throughout the process to gather stories rich with values, hopes/concerns and action ideas on an idea wall, in spontaneous story circles or a private storytelling booth. You might also use this venue to verify what was heard, establish goals or priority action items by collecting comment cards.

Phases: 1-3

Tasks: Gather stories, including values, hopes/concerns, action ideas

Audience: Usually general public, depending on the event

Cost: Low

Timing: Most community events happen in the summer or near major holidays, such as Christmas or Halloween.

Heart & Soul Communities: Biddeford, ME; Golden, CO; Cortez, CO; North Fork Valley, CO; Essex, VT; Damariscotta, ME

Description: A Heart & Soul Resource Fair is used primarily for sharing information about services or programs in the community. Resource Fairs are generally set up in a large space where different organizations have tables to provide information about their offerings. These can also be done as traveling resource fairs at block parties. A fair can be an effective engagement tool in Phase 4 (or earlier) for connecting lead organizations in implementation with interested volunteers or others willing to provide support.

Phases: 2-4

Tasks: Implement

Audience: General public, audiences targeted for implementation

Cost: Medium

Timing: Any time of year, consider conflicts and weather

Heart & Soul Communities: Gardiner, ME; Golden, CO

Description: Digital storytelling captures people's stories on video or audio recordings. This can be captured during a live interview, or people can submit their stories independently. Some communities set up a travelling story booth, which was essentially a laptop with a camera that they took around to various locations and provided a private space for people to record their stories. Stationary story booths may also be set up as long-term installments in various locations, though it may be more challenging/costly to secure the recording equipment.

Phases: 2

Tasks: Gather stories, including values, hopes/concerns

Audience: General public

Cost: Cost varies widely

Timing: Any time of year

Heart & Soul Communities: North Fork Valley, CO; Biddeford, ME; Essex, VT; Victor, ID; Polson, MT

Description: Focus groups are a type of interview where a facilitator gathers feedback from a small group of people. Usually, people in the group share similar characteristics—they could all work for a local non-profit, or come from the same part of town. (These may also be called affinity groups.) In Heart & Soul, focus groups may be used to engage target audiences for a variety of purposes, asking them to share stories about what matters most to them, verify what was heard, evaluate action ideas, etc.

Phases: 2-3

Tasks: Gather stories, including values, hopes/concerns, action ideas; Verify Heart & Soul statements, goals; Strategize (evaluate action ideas)

Audience: Target audiences

Cost: Low to medium

Timing: Any time of year

Heart & Soul Communities: Essex, VT



Idea Wall

Locative Media

Online Forum/Social Media

One-on-One Interview

Description: Locative media is an engagement method that links information, such as art or stories, to a geographic location. Information can be connected to a physical place for people to see and experience when they are out and about in your town, or it can be virtually linked to locations using an online map. Tying information to specific places can help people better understand the context of a community discussion. By sharing community insight about places in the community, you help create shared learning about what places people care about and why they are important.

Phases: 2, 4

Tasks: Gather and share stories, including values, hopes/concerns

Audience: General public

Cost: Varies widely depending on type of media used

Timing: Avoid harsh weather months if using outdoor sites

Heart & Soul Communities: Biddeford, ME

Description: One-on-one conversations allow time for a deep exploration of the interviewee's perspective and experience. Scheduled interviews can be a good way to engage members of your community who are hesitant to share their thoughts in a group setting. Consider having people who don't normally interact with one another interview each other to build relationships between them.

Phases: 2

Tasks: Gather stories, including values, hopes/concerns

Audience: Target audiences

Cost: Low

Timing: Any time of year

Heart & Soul Communities: Golden, CO; Biddeford, ME; Damariscotta, ME; Victor, ID; Gardiner, ME; Cortez, CO; North Fork Valley, CO

Description: Idea walls are spaces to brainstorm ideas: pieces of butcher paper tacked on a wall or permanent art installations. It is most useful for early brainstorming or as a tool for reaching people who might not participate in community meetings. Idea walls can be structured or left open and free-form. The duration of a wall can be limited to one event or extended over days and weeks. The location of an idea wall allows for targeting a particular audience.

Phases: 2

Tasks: Gather stories, including values, hopes/concerns, action ideas

Audience: General public or target audiences, depending on location of the idea walls

Cost: Low

Timing: Avoid harsh weather months if using outdoor sites, using as a storefront window

Heart & Soul Communities: North Fork Valley, CO; Gardiner, ME; Damariscotta, ME

Description: Online forums allow people to share their ideas and insight from the comfort of their own home via the internet. This method is a great way to involve people who might otherwise be too busy to come to a meeting. It should complement, rather than replace face-to-face activities. While the primary use is usually to generate ideas, many sites include functionality that supports information sharing, strategizing, and even relationship building. Social media can also be used similarly.

Phases: 1-4

Tasks: Gather stories, including values, hopes/concerns, action ideas; Verify Heart & Soul, goals; Strategize (evaluate action ideas); Implement

Audience: General public or target audiences

Cost: Low to medium, depending on online platform

Timing: Any time of year

Heart & Soul Communities: Golden, CO; Cortez, CO; Gardiner, ME; Laconia, NH; North Fork Valley, CO

Print this page and the following page double-sided and cut out to create four cards. Use short-edge binding so the text is oriented the same way on the front and back of each card.



Research Teams

Road Show

Scenario Planning

Site Visits

Description: A road show is a series of presentations to orient people to a project. Rather than expecting people to come to you, hit the road to visit different organizations or small groups in your community. While road shows primarily serve the goal of information sharing, they can also foster goodwill and help to build relationships. You might also use these as opportunities to collect stories, incorporating some discussion time or group to group story sharing into your time on the agenda.

Phases: 1-4

Tasks: Gather stories, including values, hopes/concerns, action ideas; Verify Heart & Soul, goals, action ideas; Implement

Audience: Target audiences

Cost: Low

Timing: Any time of year

Heart & Soul Communities: North Fork Valley, CO; Golden, CO; Polson, MT; Victor, ID

Description: Research teams are a method for fostering shared learning among community members. Often formed as a task force, research teams investigate a topic using interviews and research, then present findings to the community. Research teams are an effective method for engaging youth when combined with a classroom component or after-school program.

Phases: 2-4

Tasks: Gather action ideas; Strategize (develop goals, evaluate action ideas)

Audience: General public

Cost: Cost varies

Timing: Any time of year, but consider conflicts

Heart & Soul Communities: Biddeford, ME; North Fork Valley, CO

Description: There are many ways to do site visits, such as bus or walking tours of key places in town. There's really no better way to get to know your community than to see it from walking around. A tour can be structured as an information-sharing event, introducing participants to a new project proposal in the community. Tours can also be combined with other activities such as community mapping exercises, walkability audits, or interactive scavenger hunts to gather information.

Phases: 2-3

Tasks: Gather stories, including values, hopes/concerns; Strategize (evaluate action ideas)

Audience: General public or target audiences

Cost: Varies widely depending on existing resources and details of approach

Timing: Avoid harsh weather months

Heart & Soul Communities: Gardiner, ME

Description: Scenario planning is a method that describes a range of activities and exercises for generating alternative outcomes or actions. It is scalable and can be used to understand alternatives to a discrete project or different futures for a whole community. This can be done in small group discussions or large community meetings. Use scenario planning during Heart & Soul to strategize and problem solve, build a shared vision, and foster shared learning. Various tools are available to help with scenario planning events including CommunityViz (high tech), Chip Game (low tech), etc.

Phases: 3

Tasks: Strategize (evaluate action ideas)

Audience: General public

Cost: Cost varies based on size/type of forum used

Timing: Any time of year, but consider conflicts and weather

Heart & Soul Communities: Victor, ID; Damariscotta, ME



Story Circle

Story Listening
(Small or Large Group Settings)

Survey

World Café

Description: Story listening is an essential piece of community storytelling. It engages community members in harvesting Heart & Soul themes from pre-recorded stories or reviewing other materials like murals, photos, etc. It builds relationships, as it promotes empathy and understanding of different perspectives. It should be done in a way that allows people to hear from others with whom they don't normally interact.

Phases: 2

Tasks: Harvest Heart & Soul information: values, hopes/concerns, ideas for action

Audience: Great for target audiences, especially to build relationships between groups

Cost: Low

Timing: Any time of year

Heart & Soul Communities: Golden, CO; Biddeford, ME; Damariscotta, ME; Victor, ID; Essex, VT; Gardiner, ME; Cortez, CO; North Fork Valley, CO; Polson, MT

Description: World Cafe is a technique for large group dialogue based on rounds of small group discussions. Each small group is given a different topic. Then participants discuss that topic for a set amount of time before moving to another small group. After the discussion rounds, participants share their reflections with the large group. World Cafe is useful for examining existing conditions, setting goals, and generating ideas for action items.

Phases: 2-3

Tasks: Strategize (develop goals, evaluate action ideas)

Audience: General public

Cost: Medium to high

Timing: Any time of year, but consider conflicts

Heart & Soul Communities: North Fork Valley, CO, Biddeford, ME; Golden, CO

Description: A story circle is a storytelling method that is good for an in-depth exploration of what matters most to your community. This approach invites a small group of people to share and listen to each other's stories and then to acknowledge shared experiences. These can be done in small neighborhood meetings, in breakout sessions as part of a larger meeting, or at events in the community.

Phases: 2

Tasks: Gather stories, including values, hopes/concerns

Audience: General public or target audiences, depending on design

Cost: Low

Timing: Any time of year

Heart & Soul Communities: Golden, CO; Biddeford, ME; Damariscotta, ME; Victor, ID; Essex, VT; Cortez, CO; North Fork Valley, CO; Polson, MT

Description: A survey is a method for gathering feedback. Surveys can be conducted in various ways—mail or in person hard copies, online, or phone. Most Heart & Soul communities used surveys that aren't statistically valid but still provide useful information. Consider offering both online and offline options. Also consider having some fun with it, like using jars of marbles at a community event; people add a marble to the jar with the community Heart & Soul statements that reflect what matters most to them as well.

Phases: 2-3

Tasks: Verify Heart & Soul, goals, action ideas; Strategize (evaluate and/or prioritize action ideas)

Audience: General public or target audiences

Cost: Varies widely

Timing: Any time of year

Heart & Soul Communities: Victor, ID; Essex



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