



Why
Heart & Soul?
Community Planning ■

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In 2008 the Orton Family Foundation began a \$10 million, five-year initiative to develop a new approach to values-based community planning. This new way of building vibrant and enduring communities is designed to bring citizens back into the process of charting the future of their cities and towns. We call our approach “Heart & Soul Community Planning”.

We piloted Heart & Soul Community Planning in partnership with five communities in the Northeast and Rocky Mountain regions, testing new methods, tools and messages. You can learn more about the five towns on our website (<http://www.orton.org>). Our early successes have inspired us to further refine this Heart & Soul approach and the tools and techniques for engagement and decision making.

What Is Heart & Soul Community Planning?

Let me offer a little background on the philosophy and choices that are the basis for Heart & Soul Community Planning. The Foundation believes that citizens have the ingenuity and know-how to write the next chapter of their community’s story: to ensure the sustainable economic, environmental and social well being of their towns. With the participation of those who live, work and play in a community, a town can tap into its own values to direct growth and change, protecting and enhancing its heart and soul. James Surowiecki captured our thinking when he said: “If you want to solve a complicated problem, or make a good decision, the best thing you can do is to cast a wide net and to incorporate the judgments of many people, rather than just a few. Crowds of people, it turns out, are not dumb. Much of the time, in fact, they turn out to be brilliant.” [*Scenarios, Winter 2007-08*].

We coined the phrase “Heart & Soul Community Planning” to embody our unique approach to engaging citizens to define their own vibrant and enduring future. Our approach supports diverse citizens finding common ground and acting to enhance a town’s most important values—its Heart & Soul. If lost, those values and their manifestations in the landscape would be widely missed; their absence would diminish the character of the town and resident’s quality of life.

Why a New Approach?

Small cities and towns across America face many challenges. Towns that are close to significant scenic and natural recreational resources face increasing development pressure from telecommuting professionals able to leave behind their urban lives to enjoy the outdoors. Burgeoning retirement populations seeking a quality, low- stress way of life are also moving to these picturesque and desirable places. Other communities suffer from youth exodus, rapidly shifting demographics, crumbling infrastructure and outmoded economies, and may be tempted to embrace development at any cost. Stories of confrontation and alienation around community decision-making are commonplace; skepticism, fatigue, intimidation or a sense that their voices don’t count make many citizens simply opt out of their towns’ important deliberations.





Community planning in America has yet to live up to its full potential to engage a broad, representative base of local citizens to define and shape the future of their communities. Traditional planning driven by experts and informed by quantitative data frequently fails to account for the particular ways people relate to their surroundings and each other, and discounts the intangibles—shared values, beliefs and customs—that make each town unique. “Anywhere USA” homogeneity has spread rapidly across our country with serious losses of the characteristics and landscapes that once made places so special. With the prospect of 100 million more people in the U.S. by 2050, the need to radically improve the way communities steer their change will become ever more pressing.

Why is a town’s uniqueness important? Because community character and spirit create differentiation, and differentiation creates social and economic value. To remain culturally and economically vital, a town must discover, describe and support its unique qualities. Distinctiveness makes a place stand out, makes its residents care about it, and ultimately builds enduring cultural, social and economic success.

What Is Different about Heart & Soul Community Planning?

Under this new approach, planning the future of a community starts from the ground up and remains connected to the people who live and work there. In Heart & Soul Community Planning, new relationships between groups that no longer talk—or never did—are nurtured, honored and perpetuated.

This kind of bridging is accomplished when residents listen to what’s important to their neighbors through sharing stories of what matters and their aspirations for the future. The “Public Hearing, City Hall, 7:30 PM” days are gone, replaced by “We’re coming to your school, Community Center, home or neighborhood to listen to your stories, your hopes, your concerns.” We have witnessed that when a community has wrestled with visions of its future weighted against its values, it develops a pathway for growth leading to quicker, less divisive actions and results *with continued participation* and support by citizens.

The work doesn’t stop after this new collection of voices more deeply describes what the community values. What good will it be if nothing happens afterwards? We’re sure you are not interested in producing another vision that winds up sitting on a shelf. Heart & Soul Community Planning calls for putting that vision to action—through regulation and policy, through new decision-making processes, through community development initiatives and all with continued citizen engagement. These decisions must be stewarded over time so that citizens and their elected officials are empowered by and held responsible to this approach, and remain accountable to the community’s vision and values.

As we’ve worked in our communities and held our two CommunityMatters® conferences, hundreds of people have helped us develop guiding Principles and have begun changing their communities back home. We invite you to join in this work—in this movement. Let us know of your successes and challenges, and good luck!





Heart & Soul Community Planning Principles

Heart & Soul Community Planning is grounded on a set of guiding principles that can be applied at any stage of a community project:

1. Engage the whole community

Go directly to the people, and go early and often—do not expect them to come to you. Offer a wide range of meaningful, relevant and compelling opportunities for engagement and don't stop until *all* parts of the community are represented.

2. Respect local culture

Get to know your community and its citizens. Work with both formal and informal leaders and networks. Be sure your methods, language and intentions reflect local ways.

3. Do things differently

Be bold. Experiment with new ideas and tools. Commit to innovation and risk-taking, learn from mistakes, and change what doesn't work.

4. Build community

Aspire to build trust and new bridges, common ground and civil dialogue. Listen to people's stories and help them talk to each other.

5. Draw connections

Evaluate decisions for their direct and indirect impact on community well-being. Help people see connections between *all* aspects of their future.

6. Let values guide decisions

Articulate what matters to citizens and let those values drive community decisions from budgeting to multi-year visions.

7. Be transparent and accountable

Make information readily accessible and keep the community involved and informed. Measure and report progress to hold leaders accountable for action.

8. Act now and act often

Take action and create tangible results throughout the planning process to validate participation and demonstrate success. Encourage all citizens to take responsibility for change.

9. Invest in the future

Engage people and partners for the long run, supporting new leaders and volunteers. Build the knowledge, skills and resilience to help the community take action, steward success, and face new challenges.

