



Growing with Heart and Soul: *Building a Future for Values-Based Planning*
A Convening Held by the Orton Family Foundation
October 5, 2010; 1:00-5:00 p.m.
Grand Hyatt Denver, Mt. Wilson room (Third Floor)

Meeting Agenda

- 1:00-1:30 Welcome and Framing the Meeting
Foundation's H&S Demonstration Projects and
CommunityMatters conference and network
- 1:30-2:30 Roundtable discussion of how participants' work relates to H&S
Approach and Principles
- 2:30-4:00 Further Exploration of What We Have In Common
Do H&S Principles provide cohesion?
- 4:00-5:00 Developing a H&S Affinity Group
What could it look like?
What would it require to sustain?
How does it fit within CommunityMatters and other networks,
affiliations, etc.?

Reading provided:

- (1) H&S Community Planning White Paper
- (2) H&S Community Planning Principles
- (3) Biddeford, Damariscotta, Golden, Starksboro and Victor reports
- (4) Convening Bios



The Heart & Soul Community Planning Initiative **Steering change through people, place and values**

William Roper, President and CEO, the Orton Family Foundation

September 30 2010

The Orton Family Foundation was formed in 1995 to help citizens in small cities and towns in the Northeast and Rocky Mountain regions meet the challenges of planning for the future. It first produced tools and programs that emphasized visualization, analysis and alternative scenarios to help townspeople quickly see and clearly understand the range of growth possibilities in their communities and the consequences of such choices. Those efforts included development of the revolutionary CommunityViz[®] planning software, the Foundation's Community Video program to help communities capture visions and challenges, and its Community Mapping program to engage youth in decisions regarding local resources.

The past several years have seen the Foundation increase its support for community leaders and boost citizen participation in discussions and decisions through keypad polling, online surveys, websites and blogs. It is now developing a "Heart & Soul Community Planning" approach to engage citizens in land use planning as a pathway to vibrant, enduring communities. Every town has authenticity, character, spirit—its own heart and soul. One-size-fits-all development means that many towns in America are losing what makes them unique, those special qualities and distinctive characteristics that keep a place from becoming *Anywhere, USA*.

The Orton Family Foundation works with communities to counter such consequences, first, by asking citizens what they value most about their communities and, second, by placing these shared values at the center of the planning process. We believe that an engaged community drives innovation, takes action and creates enduring successes.

Challenge and Opportunity

Small cities and towns face many challenges. Towns that are close to significant natural resource amenities face increasing development pressures from urban professionals plying their trades via the Internet and enjoying the great outdoors, and from burgeoning retirement populations seeking the high quality, low stress way of life offered by these picturesque and desirable places. Other small communities suffer from youth exodus, crumbling infrastructure and antiquated

economies, and are tempted to embrace development at any cost. Climate change, escalating energy costs, “Anywhere, USA” development and the recent economic crisis bring additional challenges. Change is occurring in all towns (much of it driven by regional or global forces beyond their control) and competing interests can tear the social fabric. Stories of confrontation and alienation are commonplace in local newspapers, and many citizens simply opt out of their towns’ important discussions and decisions due to skepticism, fatigue, intimidation or a sense that their voices don’t count.

The need for a new approach is predicated on the Foundation’s belief that land use planning in America has yet to live up to its full potential to engage a broad base of local citizens in defining and shaping the future of their communities. Traditional quantitative approaches to planning generate and use important data about demographic and economic shifts, but frequently fail to account for the particular ways people relate to their surroundings, and usually ignore or discount more nuanced information like shared values, beliefs and quirky customs that create community. Collecting data about quantifiable attributes absent a sense of shared purpose fails to inform or motivate citizens adequately enough for them to make tough, consistent decisions; data does not illustrate how citizens’ daily lives and their livelihoods, or those of future generations, could be affected.

Local citizens have the ingenuity and greatest ability to ensure sustainable economic, environmental and social well-being for their communities. The full participation of those who live, work and play in a community allows a town to tap its deep beliefs, find common cause, direct the forces of growth and change, and protect and enhance its *heart and soul*—those attributes that residents treasure and that connect them to one another and to their community.

Our commitment to community heart and soul work is based on more than first-hand observation; it is rooted in others’ thinking and work as well. Our belief in the intelligence and integrity of citizens harks back to Thomas Jefferson, who placed an abiding faith in the ability of common people to make sound decisions, a right and responsibility enshrined in our Constitution. During the twentieth century, some state and federal planning policies and local and regional planning laws included citizen participation. Unfortunately, during this same time (and particularly between 1920 and 1980) local governments became increasingly structured and top-down. Not surprisingly, citizen participation fell off dramatically.¹ In his landmark book, *Bowling Alone*, Robert Putnam chronicles the breakdown of society and the weakening of “social capital” through the latter half of the twentieth century, and describes how an increasingly top-down, non-responsive approach by governments feeds the disenchantment and apathy of citizens.

¹ Matthew McKinney and William Harmon. *The Western Confluence* (Washington, D.C.: Island Press, 2004), 14.

It's About People

As we enter the twenty-first century, there are signs that citizens expect to have a greater role in community decisions. “[C]itizens seem better at governing, and worse at being governed, than ever before.... We are leaving the era of expert rule, in which elected representatives and designated experts make decisions and attack problems with limited interference, and entering a period in which the responsibilities of governance are more widely shared.”² The Foundation has witnessed many examples of “ordinary” citizens leading the way, and Robert Putnam, Lewis Feldstein and Donald Cohen’s book, *Better Together*, brings to light inspiring stories about citizens demanding and leading change.³

The prospect of greater participation can be daunting, even frightening. Some elected officials try to avoid public meetings given how messy, fractious and time-consuming they can be. The Foundation believes that the gridlock produced during public meetings is actually a function of too little, rather than too much, public involvement. Matt McKinney and Will Harmon agree, and suggest five reasons why a truly open decision-making process is superior to the typical “public hearing” approach: (1) citizen participation is a natural right in a democracy, (2) citizen participation provides a sustained sense of accountability by decision-makers, (3) citizens create better policies and programs and improve the quality of decisions and outcomes, (4) citizens who live in a particular place have a good understanding of that place, and (5) participation is essential for complete human fulfillment.⁴

When the Foundation meets with elected officials, it often finds the notion of greater public participation superficially embraced yet barely implemented. Divesting decision-making responsibility to the citizens is an uncomfortable notion, yet the results demonstrate the efficacy of the approach. In his bestseller *The Wisdom of Crowds*, author James Surowiecki hones in on a truth: better decisions are made through greater citizen participation. As Surowiecki wrote in the Foundation’s *Scenarios* e-journal, “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.”⁵ For leaders who remain unconvinced about the wisdom of bringing diverse citizens and interests into a planning process, substantial research demonstrates that “public engagement in planning...can lead to...plans that are more likely to be adopted and implemented.”⁶ That has been the Foundation’s on-the-ground experience as well:

² Matt Leighninger. *The Next Form of Democracy* (Nashville, TN: Vanderbilt University Press, 2006), 2.

³ Robert D. Putnam, Lewis Feldstein and Donald J. Cohen. *Better Together: Restoring the American Community* (New York: Simon & Schuster, 2003).

⁴ McKinney and Harmon, 9,18

⁵ James Surowiecki. “The Wisdom of Communities.” *Scenarios e-journal*, Winter (2007/2008), <http://www.orton.org/index.cfm?fuseaction=page.viewpage&pageid=677> (accessed June 4, 2008).

⁶ Lieske, S., Mullen, S. and Hamerlinck, J.D. Under Review. *Enhancing comprehensive planning with public engagement and planning support integration*. In Geertman, S. and Stillwell, J. (eds.) *Planning Support Systems: Best Practices and New Methods*.

When significant and diverse numbers of citizens are involved from the beginning of a planning process and when they remain engaged throughout, the success rate for adopting comprehensive plans and implementing zoning regulations is high.

Even when local officials encourage citizen participation, they need help and direction. To maximize the effectiveness of public participation, smaller group discussions are most effective.⁷ Only in smaller groups can participants develop the kind of trust required to openly describe their deeper and truer sentiments. Once voiced, these sentiments lead to important discoveries and resilient social capital, capital that is essential to more equitable, longer-lasting decisions.⁸ Small group sessions must be carefully conducted to provide safe and productive places for people to talk, listen and learn.⁹ And while communities work hard to provide settings that will foster insightful conversations, they must work even harder to hear new voices and achieve a diversity of viewpoints typically absent from community planning discussions. “Diversity makes for richer learning, more interesting relationships and increased creativity.”¹⁰ The importance of diversity of representation and viewpoints cannot be overstated. “[I]f you can assemble *a diverse group* of people who possess *varying degrees of knowledge and insight*, you’re better off entrusting it with major decisions rather than leaving them in the hands of one or two people, no matter how smart those people are” [emphasis added].¹¹

In its Heart & Soul Community Planning approach, the Foundation recognizes the need to reach out into networks and neighborhoods to listen to those who know their town best, but whose insights and leadership are rarely sought. To understand what makes a community tick, we must go to people where they live, work and play, listen to them and learn from them; much wisdom about a town’s issues and uniqueness resides in the informal networks that weave the social fabric.¹² To foster these kinds of discussions and bring relevancy to an ordinarily dry process, the Foundation is using storytelling in four of its projects. The communal act of telling and listening to stories builds essential trust and relationships; if solid and successful, they will fuel continued participation and give life and resiliency to these important informal networks. Stories also provide lasting and motivating truths, “Stories can accomplish what no other form of communication can – they can get through to our hearts with a message. In our world of information transfer, data exchange, and media impressions, where we have become callused by so much communication, stories have the power to speak to us about what truly matters”.¹³

⁷ Leighninger

⁸ Robert Putnam and Lewis Feldstein are “the fathers” of this contention.

⁹ Leighninger suggests components that are vital to small group discussions: (1) having an impartial facilitator (2) allowing groups to set their own ground rules, (3) providing ample opportunities to compare personal experiences, and (4) using a written guide to help structure the sessions. Leighninger, 5-6.

¹⁰ Etienne Wenger, Richard McDermott and Bill Snyder. *Cultivating Communities of Practice* (Cambridge, MA: Harvard Business School Press, 2002).

¹¹ James Surowiecki, *The Wisdom of Crowds* (New York: Random House, 2005), 31; McKinney and Harmon.

¹² See also, Jim Kent’s “Discovery Process”

¹³ Will Rogers, *The Story Handbook - Language and Storytelling for Land Conservationists*, (Trust for Public Land 2002), p. 1

Two other key ingredients to catalyze and cultivate public input are: (1) conducting numerous small group meetings (more chances to meet and share, while time consuming, allows for the greatest diversity and the most fruitful conversation),¹⁴ and (2) aggregating all information to ensure the most accurate representation of citizens' voices and arrival at the best decisions.¹⁵ Aggregation produces statistically sounder input and reinforces the participants' sense that they are part of something larger. According to Cecilie Andrews, "Individuals like to start with the personal but are often even more motivated when they see that their personal contributions are part of and advancing something larger."¹⁶

Breaking Down Cognitive Barriers

The Foundation has also explored the field of social psychology to learn about cognitive barriers to effective citizen participation. This research led us to apply cognitive theory to land use planning, supplementing the literature with interviews of sixteen experienced planners. While the authors explored four different categories of cognitive barriers and a number of sub-categories of situational barriers found in public planning processes, the conclusions and

recommendations time and again reinforced what we are pursuing in the Heart & Soul approach:

- Use seasoned facilitators
- Keep discussions at the options level for as long as possible
- Reframe issues to draw in the broader context
- Make values an explicit part of the conversation
- Encourage communications that help reveal motivations and create frameworks for collaboration, employ visualization to bridge gaps in understanding
- Engage people in interactive exercises
- Build trust among participants
- Incorporate face-to-face interaction
- Demonstrate accomplishments (even if only incremental)
- Reach out to all community members to include people or groups that rarely participate.¹⁷

Technology as an Aid

Besides going out to where people live to listen and learn, towns can follow the Foundation's lead in using technology to facilitate communication, develop social networks, and aggregate and analyze information. Through its CommunityViz software and Community Video and Community Mapping efforts, the Foundation brought visualization, personal observation and hard data to the

¹⁴ Leighninger, 7

¹⁵ Surowiecki, *The Wisdom of Crowds*.

¹⁶ Cecilie Andrews, *Slow is Beautiful: New Visions of Community, Leisure and Joie de Vivre* (Gabriola Island, British Columbia: New Society Publishers, 2006); Putnam, Feldstein and Cohen.

¹⁷ Joshua DeFlorio, Patrick Field and Kate Harvey. "Cognitive Barriers in the Land Use Planning Process" (Boston, MA: Consensus Building Institute 2007).

forefront of community discussions, thus allowing citizens to react on a personal level and witness the impact of values and decisions (both positive and negative) on the larger community. It has employed keypad polling in many of its public meetings to ensure a truly democratic experience and accurately collect and interpret input. Now we are turning to the Internet to reinforce community communication and networks. So long as technology is used to supplement rather than replace human interaction, it can positively enhance public participation and increase social capital.¹⁸ This has led the Foundation to: use blogs, wikis, and YouTube; construct an on-line, open source Community Almanac that promotes the sharing of stories about people (www.communityalmanac.org); and search for other effective, online approaches such as Front Porch Forum.¹⁹

In addition, the Foundation is about to release an online research engine, called the Planning Tools Exchange (PlaniTE_x). PlaniTE_x is an online platform designed to help a broad range of users (citizens, planners, scientists, elected officials, consultants, and more) find, share, and contribute information about decision-support tools, projects and resources in community planning and related fields. The website serves as a community clearinghouse, promoting interdisciplinary collaboration by organizing information and resources supporting local and regional community planning and ecosystem-based management according to five linked themes:

- **Tools** - A blend of Comprehensive Processes, Activities, Software/Web Tools, and Methods designed to help communities make smart growth decisions.
- **Projects** - Case Studies representing a wide range of geographic locations, community types, planning processes, tools, and outcomes.
- **Resources** - Standalone publications, toolkits, databases and other resources to assist in the community planning process.
- **Organizations** - Companies and organizations providing assistance with community planning including consultation, resources, and/or project management.
- **Practitioners** - Professionals offering a tool, service or resource to community planners, or willing to share experiences in community planning.

It's About Place

Community planning is about place as much as it is about people. When residents answer the questions "How did you come to live here?" or "What will keep you here?" they often name nearby natural, recreational or built treasures. Their surrounding landscapes and village centers help define communities, and pride of place gives definition to a town's heart and soul. Randy Hester demonstrated the importance of place in his work in Manteo, North Carolina: "The sacred

¹⁸ Joel Kotkin, *The New Geography: How the Digital Revolution is Shaping the American Landscape* (New York: Random House, 2001); Clay Shirky, *Here Comes Everybody: The Power of Organizing Without Organizations* (New York: The Penguin Press, 2008); DeFlorio, Field and Harvey; Putnam, Feldstein, and Cohen.

¹⁹ The Front Porch Forum. <http://www.frontporchforum.com> (accessed June 4, 2008).

places in Manteo are buildings, outdoor spaces, and landscapes that exemplify, typify, reinforce, and even extol the everyday...patterns and rituals of community life. They are places that are so essential to the lives of residents through use of symbolism that the community collectively identifies with the places. . . . The loss of such places would reorder or destroy something or some social process essential to the community's collective being."²⁰

America's increasingly mobile and affluent professionals have the means to choose where they will live and work as their jobs become more "location neutral." Consequently place rather than traditional employment opportunities has assumed a greater role in where people live.²¹ These new residents often bring personal and spiritual commitment to their newly chosen places, and values are becoming part of debates in communities.²² Joel Kotkin writes, "As people and advanced industries hunt the globe for locations, they will not necessarily seek out those places that are the biggest, the cheapest, or the most well favored by location. Instead, they will seek out a new kind of geography, one that appeals to their sense of values and to their hearts, and it is there that the successful communities of the digital age will be found. In the twenty-first century, and even beyond, communities can only survive and prosper by being something more than soulless zip codes of brick and glass...."²³

While place is so important to people, they often express helplessness at affecting the type or pace of development in their communities. This can result from top-down governing or a process that is neither accessible nor relevant until it is too late. Citizens are, however, waking up to the homogenization of their communities and their country and are demanding a voice.

Heart & Soul Community Planning

Our research, discussions, fieldwork and experience support the urgent need for processes and tools that foster true, place-based democracy. Through its Heart & Soul approach, the Foundation seeks to inclusively: (1) engage broader, more diverse and representative community members; (2) catalyze community and personal discussions that harness the power of storytelling to identify fundamental values, build civic spirit and generate social capital across political, economic, racial and other historic or emerging divides; (3) connect the citizens' conversations to place; (4) devise a consensus-based course for change and future growth that reflects shared values and enhances both the places and the communities in which people live, work and play; (5) engender a culture where land-use decisions are made only after consideration of their effects on both Heart & Soul attributes and economic concerns; (6) ensure that a community's unique attributes are protected

²⁰ Randolph T. Hester, *Design for Ecological Democracy* (Cambridge, MA: MIT Press, 2006).

²¹ Kotkin

²² Ibid.

²³ Kotkin 26,188 – 189.

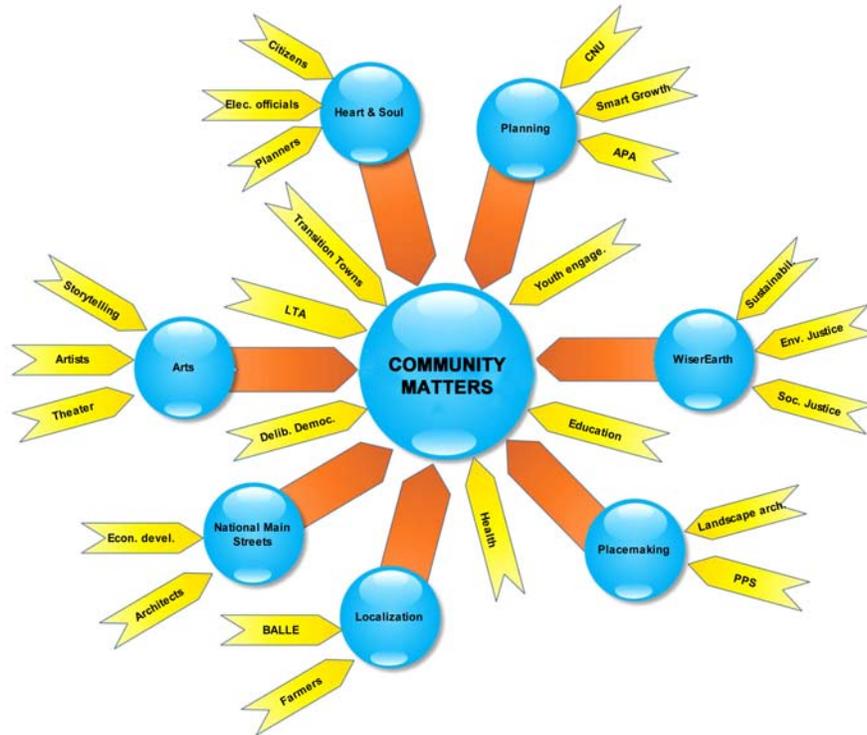
and supported through policy, ordinances and public investment; and (7) devise ways for local leaders to steward this work and hold themselves accountable through monitoring of decisions, actions and results.

The Foundation recognizes the immense challenges confronting the Heart & Soul approach (or any approach) to finding successful and scalable solutions. The challenges reflect the infinite variability within and between communities: landscapes, population trends, leadership, economies, histories and resources are a few of the variables. We need success stories of innovative approaches to this work to turn challenges into opportunities. To that end and through an RFP process, the Foundation initiated work in 2009 with 5 communities: Damariscotta and Biddeford, ME; Starksboro, VT; Golden, CO and Victor, ID. We are providing \$100,000, extensive staff support, and technical assistance to these five communities that have committed to undertake a two- to three- year planning process in which they describe and begin to apply and steward their Heart & Soul values and attributes. Accompanying this paper are reports on each project, which are works still in progress.

Building a Movement

Through its Heart & Soul Community Planning initiative the Foundation will collaborate with willing communities and partners to develop the processes and tools that provide pathways to the futures small cities and towns want to experience. While working at the community level, we disseminate stories and seek to influence the field of land use planning at a national scale. We've developed a set of H&S Community Planning Principles based on our work and what we heard at our **COMMUNITYMATTERS**[®] conference in 2007 as a way to get other communities to subscribe to and implement the principles for new engagement and planning. These Principles accompany this white paper.

With another 100 million people coming to America by 2050, we need to work with other organizations within and outside the field of land use planning. Huge changes and opportunities are coming. There are many good efforts going on around the country that reflect philosophies and approaches similar to the Foundation's H&S work. Our national efforts to connect and promote this good work (and ours) involve two primary directions. Our **COMMUNITYMATTERS**[®] conference is where we showcase our and others' success stories and examples of innovative tools and approaches, and provide workshops and other learning opportunities to elected officials, citizen planners and professional planners. Its inclusionary import is depicted below:



We envision the COMMUNITYMATTERS network serving as a “hub” in the network world, allowing us to engage and connect with numerous other allied efforts, from Placemaking to the localization movement, economics to arts (we’ve by no means captured them all here). By connecting with other “hubs,” we’ll also be able to connect with the many different individuals and organizations primarily associated with them.

We are also launching a **COMMUNITYMATTERS®** online network with the conference, offering on-line resources and connections to those intent on re-shaping how their community plans its future. This will provide even greater sharing and connectivity across fields, allowing for even larger impact.

We agree with Paul Hawken that a broad-based movement is afoot, which among other things seeks to “democratize decision making and policy, reinvent public governance piece by piece from the bottom up, and improve [citizens] lives.”²⁴ Through heart and soul planning and nurturing a **COMMUNITYMATTERS** movement, the Foundation seeks to contribute a powerful force of change in this direction.

²⁴ Paul Hawken, *Blessed Unrest: How the Largest Movement in the World Came into Being And Why No One Saw it Coming* (Viking Penguin, 2007), p. 12

Heart & Soul Community Planning Principles

There's something special about every town – the corner barbershop on Main Street, acres of wilderness, busy local shops, hard-working lands and people, or deep-rooted traditions. That character is why people love their towns. It's why they live there. And it's also in danger.

Towns everywhere struggle to cope with rapid demographic, economic and land use changes, and many are losing what makes them special. Traditional planning processes aren't enough to respond to a dizzying array of challenges and keep our towns from becoming soulless shells of communities. And top-down, isolated decision-making isn't enough to engage today's diverse, active, information-hungry citizens, who have the power to strengthen their communities in the face of change.

*The key to successful communities is their **heart and soul** – the unique cultures, landscapes, traditions, and values that people cherish – and with people themselves taking action to sustain and enhance the places they love. Many communities are ready to protect their unique character, deeply engage their citizens, and meet the challenges of the 21st Century. For these communities, there is a new, better way forward: **Heart & Soul Community Planning**.*

1. **Go to, listen to and learn from everyone**

Spend time knowing your community. Go directly to the people, hear their stories, provide them with a wide range of opportunities for participation, and don't stop until you've heard from everyone. Real democracy is messy, but every voice matters.

2. **Do things differently**

Be bold. Commit to innovation and risk-taking and tap into community intelligence and creativity. Experiment and explore new ideas, tools and processes in unusual places with different people: you will learn even when you fail.

3. **Discover and strengthen community values**

Identify and articulate widely shared values and the aspects of community that matter most to people, and then act on them. Build understanding and trust through dialogue and interactions. Aspire to consensus, celebrate common ground.

4. **Balance facts and perceptions**

Seek out quantitative and qualitative, tangible and intangible information to understand where your community is, where it wants be, and how to get there.

5. **Consider all options**

Encourage citizens to explore a range of alternatives for the future and consider the tradeoffs of each one, without advocating for specific outcomes. Help people realize their own power and responsibility to make choices.

6. **Draw connections**

Clearly explain how community well-being is tied to each official or unofficial action and decision. Help community members link and take charge of *all* aspects of their future – sustainability, education, social equity, the economy, land use and more.

7. **Act now and act often**

Don't wait until late in the planning process to take action. Use small, early accomplishments to demonstrate success and catalyze more participation and action. Encourage all people to take responsibility for change.

8. **Invest in the future**

Engage people for the long run, build citizens' leadership and technical skills, and strengthen relationships and social capital. Ask for help, then take time to recognize the hard work that goes into community planning and the people who make it happen.

9. **Be transparent and accountable**

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

10. **Commit to Heart & Soul**

Community work is never done. Strive to embed **Heart & Soul** in all community decisions, all documents, policies and plans. Act, re-evaluate, re-engage, revise, and steward your success.

Biddeford Downtown Master Plan

Biddeford, ME

Reporting period

July 1, 2009-
June 15, 2010

Partners

City of Biddeford, Heart of Biddeford

Other Partners

Biddeford High School,
Salt Institute Public
Library

Staff

Rosenbluth; McBride;
Barstow

Total Project Budget

\$205,268

Foundation**Contribution**

\$100,000, consultants, and
in-kind staff

Project Duration

September 2008-June 2011

Issue Areas

Downtowns; economic
development; historic
preservation; master
planning; redevelopment

Methods

Facilitated dialogue;
scenario planning;
storytelling; visualization;
youth engagement

Tools

Digital storytelling; graphic
facilitation; keypad polling;
social media; GIS

Background

Stretching from the lower falls of the Saco River to the Maine coast, the City of Biddeford is poised between a hardscrabble past and a hopeful future. An old mill city of 22,000, located 15 miles south of Portland, Biddeford uses a unique brand of alchemy to turn old factories into new economies, old conflicts into new alliances, old identities into a new vision for growth and survival. Biddeford's cultural and economic roots are tied fast to the mill industry and its future may be as well. The mainstay textile companies decamped for the South decades ago and for many years the City had been down on its luck, with declining population, few job opportunities and an empty, decaying downtown. Biddeford's historic brick mill structures – the last one closed this year - remain omnipresent ghosts of an economy and an era gone by.

Biddeford's hard-working residents are now reviving and reinventing their legacy. A slate of programs and redevelopment efforts are breathing new life into the shells of factories and streetscapes and attracting new residents who take advantage of Biddeford's affordable rents and real estate. Shedding its image as the poor sister to surrounding towns, Biddeford is building a creative economy, re-establishing its Main Street, and unifying parts of the community that have become distinct and isolated: the mill district and the City center; vacation properties stretched along the coastline; and the University of New England's fast-growing campus.

Biddeford has begun a new Downtown Master Planning process and started to redevelop nearly one million square feet of long-vacant mill space, along with construction of a new Riverwalk. A controversial trash incinerator located along the riverfront is slowly planning its relocation. A successful TIF district is set up to channel funds to downtown improvements. Under the direction of Heart of Biddeford, a non-profit Main Street organization, and in partnership with the City of Biddeford, this project seeks to unite Biddeford's residents, restore pride in the community's historical legacy, and set the stage for a vibrant future.

Goals

- Engage the community, including new voices, in identifying and describing Biddeford's heart and soul

- Build common ground and a sense of shared civic pride and create bridges between diverse segments of the community, including the “Pool” along the shore, downtown neighborhoods, the University, newcomers and old timers
- Ensure that community heart and soul is central to all future downtown planning and development initiatives and that community values are reflected in planning documents
- Create a Downtown Vision Statement and Master Plan that protects and enhances the City’s unique character and special features
- Track implementation of the Master Plan
- Collect and develop lessons and stories to disseminate to a wider planning world and general public

Accomplishments

In the first year of the project, local staff and committee members focused on developing a creative project approach that would successfully engage diverse of citizens and help the community overcome an apathetic, and in some cases negative, attitude about downtown. The Project hired three storytelling fellows from the Salt Institute of Documentary Studies to help gather and share community stories as a way to highlight what makes Biddeford unique and a city to celebrate. The Project also had early success engaging local high school students to gather stories from their family members and peers. The Project established a presence at traditional community events and captured additional stories through a “HeartSpots” – a project where residents used cell phones to call a number and record stories related to specific downtown sites.



Storytelling Fellows gathered stories by going to people in places where they were comfortable, like the Palace Diner pictured here.

The Project’s first phase culminated with a community screening of the storytelling work in October 2009. Approximately 250 people took part in the storytelling phase, from high school

“This will bring pride back to people of Biddeford. When I first came, they were their own worst enemy: ‘We remember when it was great, and now it is a dump....’ Once we get the locals to be proud, the people on the outskirts will flock here. The Salt movie embraced all those perceptions; we have this great community, great architecture, we are on the coast of Maine, there is a real quality of life.”

— Local business owner

students to former mill workers to new downtown business owners. The Foundation’s Interim Project Evaluation illustrated that storytelling was successful in broadening participation and building social capital and pointed to how difficult it would have been without the assistance of the storytelling fellows.

The Project’s second phase is focused on transitioning community dialogue from stories into vision and action. Working with Everyday Democracy (EDD), the Project has held 16 neighborhood meetings in

Challenges

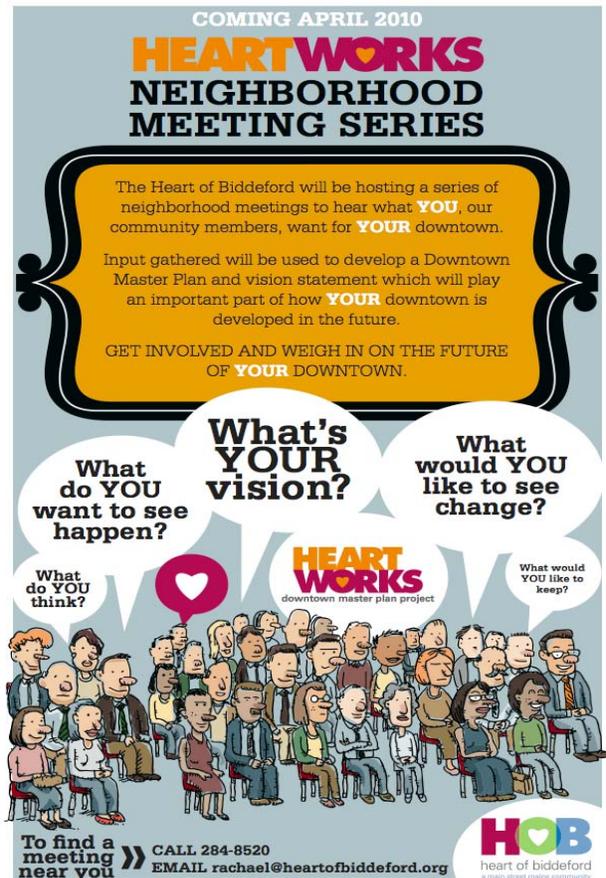
Biddeford faced several challenges in this second year. First, Heart of Biddeford (a National Main Street® project), hired a new Executive Director in December 2009, and he took over the reins as the Project's local coordinator. Although the former project coordinator has stayed on in a consulting role for six months, it has been difficult for the new director to maintain focus on the project, as he gets up to speed as the head of a quasi-public organization in a politically-challenging community.

Biddeford continued to face challenges in consistently communicating the project. The project team recently developed a communications plan and has been creating visually engaging project materials. They are also using social media, though staff notes that other channels of communication work better for much of the community. Public access TV is one example, and project staff members are also trying to start a regular downtown show. Biddeford's size and composition have required staff to be creative in how they communicate about the project. Though they struggle with reaching some of the lower income neighborhoods, they are working with local neighborhood organizations and anticipate greater participation at the upcoming forum.

The Project also faced the challenge of dwindling Steering Committee membership at the turn of the year. Fortunately, the new focus on neighborhood meetings renewed committee members' energy and the appeal of joining, and now the committee is back to around 15 active members.

"If you put citizens, business and government together there will normally be distrust. What we are now seeing in the conversation taking place is that there are problem solvers in all of those groups and that coalitions are stronger if they include all three of those groups.... If you put them together and begin the conversation and allow the conversation to be nurtured, which is what Orton is doing, you automatically create connections as you begin to listen to someone else on the other team. That is a major service that Orton provides, and it might not otherwise happen at all. We are pushing the circumstances."

— Biddeford City Official



Biddeford continues to use creative media like this poster, which was created to advertise neighborhood meetings.

Lastly, the Project is making the transition from a grassroots effort to a more formal planning structure as the focus shifts to the Downtown Master Plan, which will ultimately be a chapter in the City's Comprehensive Plan. To

help with this transition, Biddeford created a Master Plan Advisory Council to help ensure the Master Plan will be implemented by the City. The Council is a hybrid group – half of its members also belong to the Heart & Soul project steering committee and half are representatives of key City boards and departments.

Next Six Months

In next six months, Biddeford will focus on the development of the Master Plan, as well as galvanizing community action for downtown improvement. Specifically, we anticipate:

- The July, 2010 City-wide forum will provide essential input for the Downtown Master Plan and Heart & Soul vision, it will also provide a platform for locals to take action on issues they care about, relating to downtown.
- Neighborhood meetings will occur throughout the master planning process to help tease out key issues and provide direction on Master Plan elements.
- City-wide forums slated for November, 2010 and March, 2011 will provide an opportunity for locals to weigh in on the development of the Master Plan, including several future alternatives. It is likely that CommunityViz will be used in this work, but its specific application will not be fleshed out until after the July forum.
- Drafting of a Downtown Master Plan, based on Heart & Soul values, will include analysis and recommendations for the local market, land use, infrastructure and strategic properties and general improvements. It will also result in a strategic implementation plan and framework for monitoring future progress.
- Project staff will help with development and dissemination of a high school curriculum based on storytelling, deliberative democracy and youth engagement.
- Biddeford will facilitate community action on a number of shorter-term downtown initiatives as a result of the July forum.
- Fundraising will begin for implementation initiatives following the Downtown Master Plan's completion in April 2011.

The current Partnership Agreement ends with Biddeford on August 31, 2010. Foundation staff recommend extending the Agreement through June, 2011 with diminishing staff involvement so that we can continue to play a partnership role in:

- Completion of the Master Plan, including scenario planning and visualization
- Creation of an implementation framework
- Leveraging of resources, participation and partnerships for implementation
- Development of a stewardship plan (i.e. a way to measure whether H&S is being achieved through work plan activities)
- Integration of H&S into the Main Street[®] model of Heart of Biddeford

“The work is incredibly valuable and important and I would love to see this type of work happen across the country. It is outstanding, especially as the country is now, divided between the haves and have-nots; it is nice to have a way to reach across those boundaries.”

—Biddeford Committee Member

Heart & Soul Community Planning

Damariscotta, ME

Reporting period
July 1, 2009-
June 15, 2010

Partners

Town of Damariscotta,
Damariscotta Planning
Advisory Committee,
Friends of Midcoast Maine

Other Partners

Damariscotta River
Association, Spectrum
Generations

Staff

Rosenbluth; McBride;
Stone

Total Project Budget

\$216,800

Foundation

Contribution

\$100,000, storytelling
consultant, Placeways and
in-kind staff time

Project Duration

September 2008-
September 2010

Issue Areas

Comprehensive planning;
downtown development;
economic development;
environment/natural
resources; regionalism;
waterfront development

Methods

Storytelling; story circles;
community forums;
neighborhood meetings;
value mapping; scenario
planning; visualization;
design charrette

Tools

Audio stories; community
forums; Community
Almanac; CommunityViz@;
surveys; web tools; word
clouds; keypad polling

Background

In 2005 a Wal-Mart proposal forced many Damariscotta residents to realize that their locally owned stores and small-town identity were threatened by the sprawl and cookie-cutter development that had infiltrated other communities. Despite some disagreement, the Town reacted quickly to head off the proposal and turn its attention to comprehensive, long-term planning issues: integrating new commercial development with old; managing the historic downtown; and adapting to growth without losing local character and traditions. A Chamber of Commerce and the wildly successful Pumpkin Fest emerged from the shadow of the big box proposal, bringing people together. The Town has resolved to start proactively building community and planning for Damariscotta's future before another controversy erupts.

The Heart & Soul Community Planning process, led by the Damariscotta Planning Advisory Committee (DPAC) and Friends of Midcoast Maine (FMM), is using a variety of methods and tools to engage new voices and develop a shared community vision. Then the Town will translate that vision into plans and actions that reinforce the qualities that make Damariscotta a great place to live. The process will strengthen public engagement and investment in the future of the Town, increase trust among diverse segments of the population, address land use issues, lead to economic development opportunities consistent with community values and serve as a model for development practices in rural Maine.

Goals

- Use an open, inclusive process to build a community vision
- Translate vision into policies and plans, including updates to the Town's Comprehensive Plan and ordinances
- Foster public engagement in community activities and citizen investment in the Town's future
- Increase trust among businesses, nonprofits and local government with unified goals
- Encourage accessible local leadership and decision-making
- Implement more cohesive development plans on Route 1B
- Develop a regional planning approach to serve as a model
- Collect and develop Damariscotta lessons and stories to disseminate to wider planning world and general public

Accomplishments

The first year of Damariscotta's Heart & Soul Community Planning Project focused on gathering stories and identifying community values. The Damariscotta Planning Advisory Committee (DPAC) used Neighbor-to-Neighbor Chats (one-on-one interviews), Community Conversations (story circles), and Community Forums. These activities resulted in a set of six core community values and a draft community vision:

In 2030, Damariscotta is a vibrant, small Maine community that holds tradition and progress as equal partners....a Town with a strong sense of who we are. We are a safe community, a place where we can live and work locally, and where there are multiple year round opportunities to come together as a community. Traditional ways are maintained while innovations are embraced when they make good sense. We have an increasing awareness of where we have been, what our history is, and will work hard to maintain our history as we grow and change. We still leave our doors unlocked as we did in 2010.

Excerpt from the 2030 Vision statement

In the fall of 2009, DPAC geared up for a multi-day design charrette to identify the community values for a design for downtown, Route 1B and Piper Commons (a large parcel under consideration for development). The Town focused on these areas because they are designated as future growth centers through the Gateway One regional planning effort. The purpose of the charrette was to build community trust with an open, inclusive planning process; promote growth that reflects the community's core values; refine the community vision statement; and transform the commercial corridor into a more vibrant, productive and connected part of town.

In September, DPAC hosted a pre-charrette meeting where participants took part in a "poster exercise," which validated the emerging community values and identified drivers of those values. This critical step informed the development of values-based indicators, which were later used to compare charrette recommendations to the Town's current regulations.

The Town's charrette kicked off in late October. Over the course of four and a

HEART & SOUL COMMUNITY PLANNING CHARRETTE • OCTOBER 22-26, 2009

Be a Part of History... Help Plan Damariscotta's Future





Choose Damariscotta's Future – and Yours

A few individuals behind closed doors plan most communities' futures, but in Damariscotta we have the opportunity to collectively envision our town's future. We invite all residents to join in a collaborative, multi-day "charrette," or planning session, October 22-26 to help guide future growth and development in Damariscotta. Residents, business owners, youth, elected and municipal officials, and anyone else with an interest in our town will work directly with a professional Design Team—a group of designers, architects, retail consultants, traffic engineers, landscape architects, illustrators and land use professionals—to help shape Damariscotta's future.

The Damariscotta Planning Advisory Committee (DPAC) has overseen a yearlong Heart & Soul Community Planning process to engage citizens, help them describe what they care most about, and develop a common vision for our town. More than 400 townspeople have told us what they love about Damariscotta and what they'd like to change. Using that information, the Design Team is building alternative planning options that take into account impacts on social, cultural, economic, environmental, infrastructure, and other aspects of the town. Together, the citizens and the Design Team will evaluate those options and draft possible solutions to local design problems that will enhance the values and vision of all who live, work and play in Damariscotta. *cont. on page 2*

Don't miss your chance to make a difference in your town and its future! Drop in any time the lights are on.

CHARRETTE SCHEDULE

October 22-26, 2009
at the Barn at Round Top Farm
Business Route 1, Damariscotta

Thursday, October 22
6:30 pm
Opening presentation and hands-on community design workshop

Friday, October 23
10:30 am
Focus Meeting #1: Working Locally – Jobs, Downtown, Business
1:00 pm
Focus Meeting #2: Access to Town – Links between Uses, Needs, and People
2:30 pm
Focus Meeting #3: Access to Nature and Culture – Views, Recreation, Arts
4:30 pm
Pin-Up and Review

Saturday, October 24, 2009
9:00 am
Focus Meeting #4: Understanding Alternatives – Measuring and Seeing Outcomes
10:30 am
Focus Meeting #5: Living Locally – Population and Housing Needs
4:30 pm
Pin-Up & Review

Sunday, October 25
10:30 am
Focus Meeting #6: Maintaining Community – Places to Meet, Volunteers, Safety
4:30 pm
Pin-Up and Review

Monday, October 26
4:30 pm
Pin-Up and Review
6:30 pm
Closing Presentation

The public is welcome at all events! Times of scheduled sessions may change; visit www.damariscottatime.com for updates.

From Values to a Vision for Damariscotta

The Damariscotta Planning Advisory Committee is working to ensure that what people value is protected and enhanced for future generations. Damariscotta is a special place to live, work, play and do business. One way or another we all seem to know this, but over the last year of listening to residents we have heard six major themes about life in Damariscotta:

1. We can live locally, meeting our daily needs by supporting our helpful merchants.
2. We can work locally and can grow locally owned businesses.
3. We have a strong sense of community where people trust one another and feel safe.
4. We are an involved community that participates in schools, organizations, churches and community events and festivals.
5. We appreciate the close proximity of culture and nature. Right out our back doors we might see a seal or a moose, but we also have fine restaurants, art galleries, theater, book-stores and library, all within walking distance.
6. We have easy access to goods and services, to local government and to information.

Do you agree that these are the things that make Damariscotta special? What else do you want to see in our town's future? Stop in to help us refine a new vision for Damariscotta!





Damariscotta Heart & Soul Community Planning • www.damariscottatime.com • page 1

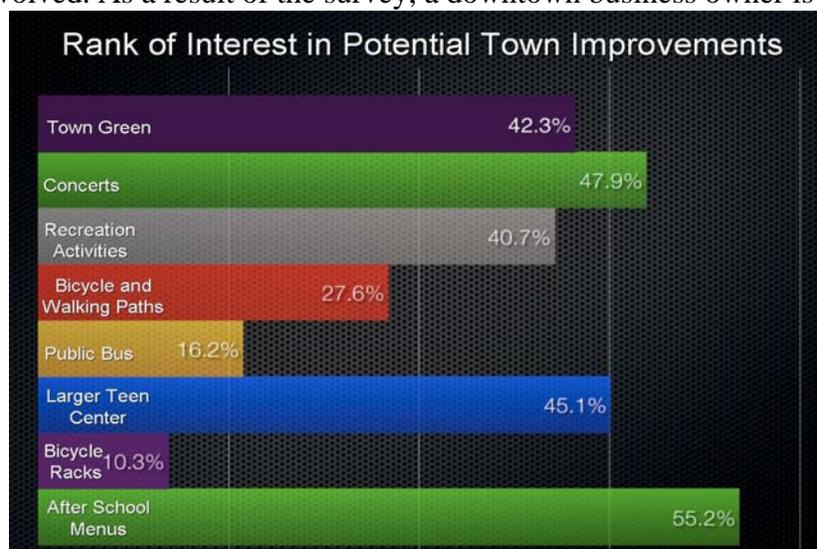
As a way to engage more people, DPAC created a tabloid about the charrette that went out in every copy of the *Lincoln County News*.

half days and with about 300 participants, the design team developed a future plan for the designated growth areas. Throughout the charrette, the design team held focus meetings around each of the community’s core values to gather more specific input. These meetings also helped to identify a number of non-regulatory actions the community could take. Each day was punctuated with a “pin up” session at which other team members and locals could provide feedback on how the designs were evolving. The charrette wrapped up with a closing presentation and keypad polling to gauge attendees’ reactions to the future plan. A majority of those responding to the polling indicated that the overall plan reflected their personal values (75%) and community values (66%), while the percentage of agreement varied for each of the specific study areas. Over the course of the next several months, the design team finalized a charrette report and presented it to the Town in April 2010.

As a result of the charrette, DPAC has taken several key steps. First, it developed an annual work plan to complete the non-regulatory actions identified during the values gathering phase and the charrette (downtown employee parking, project communications, wayfinding, etc). Second, DPAC is making progress on a number of the items in the work plan, mostly through volunteer efforts. For example, DPAC began holding neighborhood meetings to share the final charrette report more broadly and get feedback on its recommendations. To date, DPAC members have facilitated five meetings, each in a different neighborhood, with more to be scheduled. Third, DPAC has been working with the Town on developing a Request for Proposals to create Form-Based Codes for the Piper Commons property; DPAC will also play a critical role in the community education and input for this work. Lastly, the Town is beginning the process of drafting a new Comprehensive Plan, integrating the public input and findings from the Heart & Soul project.

DPAC also has had recent success engaging youth. The Project Coordinator worked with a local high school teacher and a group of 15 students to design and distribute a survey to Lincoln Academy students (the local high school). With a 74% response rate (368 surveys returned), Lincoln Academy students provided DPAC with clear guidance on what students want to see in town and how they want to be involved. As a result of the survey, a downtown business owner is working with students to create a tailored afterschool menu and youth space (more places to hang out downtown was the #1 desire of students).

Damariscotta is also helping to spread the word about Heart & Soul and is receiving outside benefits due to its adoption of the process. As a result of Damariscotta’s Heart & Soul process, the Town and partners have received almost \$50,000 in additional funding to continue this work and the



Ranking of top town improvements desired by Lincoln Academy students in recent survey.

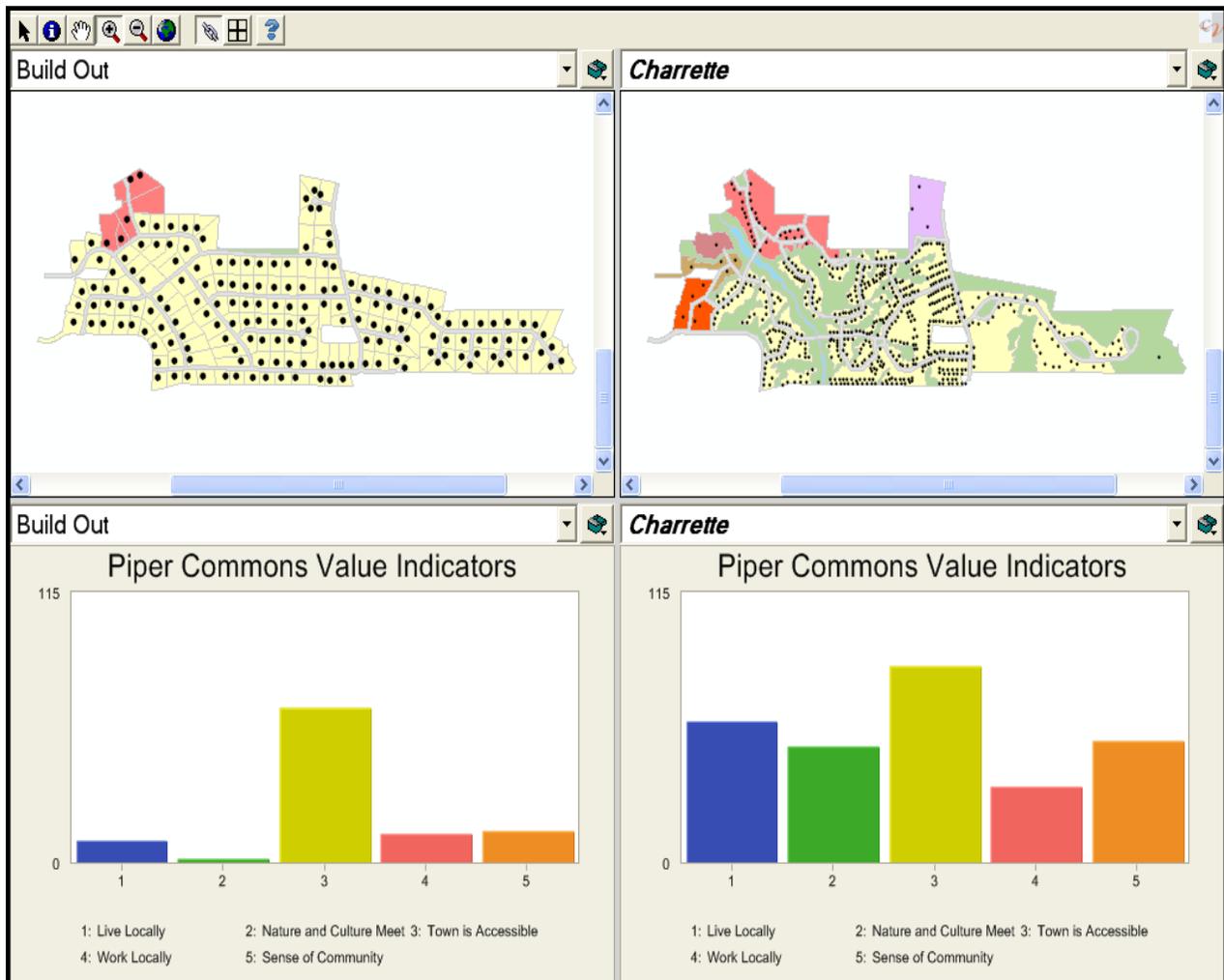
Town is a finalist for the Maine Arts Commission Creative Communities program (a \$50,000 grant). Friends of Midcoast Maine's Executive Director (and the Project Coordinator) is also spreading the Heart & Soul message and methodology in other towns in Maine and presented at the 2009 annual conference of the Northern New England Chapter of the American Planning Association. DPAC has had new members join and, in a June 2010 election, the open Select Board seats were secured by two individuals who support the Heart & Soul effort.

Challenges

The charrette presented both a huge opportunity and challenge to the Town and a learning opportunity for the Foundation, as we explored how a charrette process might align with Heart & Soul Community Planning. The timing could have been better following an update of the Town's Comprehensive Plan (in order to directly implement that Plan) but given the potential to influence new development over the next few years, including the significant Piper Commons property, it made sense to jump right in. It was an expensive activity for a small town to undertake (close to \$70,000 in cash and almost \$25,000 in-kind contributions) and expectations were very high on the part of community members. The scope of the consultant's work was very ambitious and the charrette process was on a tight timeline. Further, it called for the integration of the Heart & Soul work to date as well as CommunityViz (contracted separately from the charrette team's work), two elements with which the selected consultant team had no experience before this project.

For these reasons and others, the charrette had mixed results. DPAC was successful in getting people to participate throughout the charrette and the vibe during the event was positive and engaging. DPAC also was able to tailor the event to have more of a Heart & Soul feel than charrettes typically do; one way DPAC achieved this aim was by organizing meetings around community values. Importantly, the charrette team came up with a final plan for growth areas that reflects community values. The charrette also provided the testing ground for the first iteration of a values mapping methodology, which is likely to become a key element of Heart & Soul Community Planning in the future.

One of the greatest struggles was integrating Heart & Soul and CommunityViz into the traditional charrette process. The timing, experience, project management, different philosophies and personal dynamics among the consulting team, town and other partners contributed to this challenge. DPAC continually had to push back at the design team to meaningfully integrate community input, use more accessible language and build on the values the community had identified. Even after months of back and forth, the final report is unwieldy and requires explanation even though it has some excellent recommendations. The upside is that DPAC has taken charge of what will happen with this report and how to share it with the community more broadly, and DPAC has demonstrated its commitment to an inclusive and transparent public process for land use and community decisions.



Consultants used CommunityViz to compare the charrette team’s development recommendation for Piper Commons, a 265-acre property, with ways the property could be developed under current regulations. This graphic illustrates how the two plans compare spatially and how they stack up using the values-based indicators created through the H&S process.

DPAC continues to be challenged with engaging the whole community. The Foundation’s interim evaluation noted the project has reached historic levels of engagement in town, but is still missing significant participation among natives and young families. This finding is a key reason why DPAC chose to hold neighborhood meetings. Damariscotta is attempting to transform how local decisions have been made; it’s going to take time to institutionalize this shift and gain the trust of different parts of the community.

Next Six Months

The Town faces exciting next steps and big challenges in the coming months:

- Proceeding with code changes for the Piper Commons property. This effort will require significant public education and input and the Town has an ambitious timeline to vote on changes by year end.

- DPAC will continue to make progress on its work plan for implementing Heart & Soul and will be making a transition in how the project is coordinated (the current coordinator's time wraps up in September). Key activities include:
 - Participation in the update to the Town's Comprehensive Plan
 - Involvement in any code changes
 - Continuing to communicate clearly and consistently with the community
 - Developing a stewardship plan

Foundation staff recommends extending the current Partnership Agreement (which expires September 2010) through December 31, 2010 and allocating \$5,000 of additional funding to help DPAC achieve a sustainable process for ongoing coordination, communications and public engagement. By December 31, we predict the Piper Commons code writing will be well underway, if not adopted, and the Comprehensive Plan update will have a clear timeline for completion, with a first draft in process. Staff will remain in contact with DPAC and the Town through 2011 as these efforts are concluded, but the intensity of involvement will be vastly reduced.

“The genie is out of the bottle. As far as the way we are looking at planning goes, I don't think we could ever go back to the old way. People may not participate in everything, but they like the proactive approach and having their opinion asked.”

—Damariscotta Evaluation Interviewee

Golden Vision 2030

Golden, CO

Reporting period

July 1, 2009-
June 15, 2010

Partners

City of Golden

Other Partners

Jefferson County Dept. of Health and Environment, Greater Golden Chamber of Commerce, Jefferson County R-1 School District, Golden Cultural Alliance, Colorado School of Mines, Golden Planning Commission, City of Golden Advisory Board

Staff

Carney, Otero, Barstow, Crespin

Total Project Budget

\$311,000

Foundation

Contribution

\$100,000, storytelling consultant, Placeways and in-kind staff

Project Duration

January 2009-December 2010

Issue Areas

Affordability; civic engagement; comprehensive planning; downtowns; economic development; housing; neighborhoods; transportation

Methods

Dialogue; public-private partnerships; storytelling; visioning

Tools

Community Almanac; CommunityViz®; digital storytelling; keypad polling; surveys; web tools; word clouds

Golden, population 18,000, is the county seat for Jefferson County on the western edge of the Denver Metropolitan Area. Well known for its two prominent mesas, Golden's mountain valley is home to the Colorado School of Mines and Coors Brewing. Golden's success is tied to a history of progressive leadership and strong civic engagement. Growth pressure and regional-transportation issues prompted resident-initiated task forces to examine quality-of-life elements, including affordable housing, pedestrian and bicycle networks, and sustainability on a community-wide scale.

In 2006, a Golden survey and subsequent community-based Sustainability Initiative revealed the following priorities: a strong economy to support public services; land use decisions that preserve existing visual character and neighborhood connectivity; development that protects the environment and protects the health, welfare, and safety of Golden's citizens; parks, trails, and open space; and sound government infrastructure.

Golden Vision 2030 (GV2030) is a collective community vision and systematic relationship-building process, the product of which will inform the Comprehensive Plan, Budget and Capital Improvement Plans, municipal code updates, a Downtown Vision Plan, and neighborhood plans.

Goals

- Employ traditional and innovative methods to engage a broad cross section of residents, enabling a more complete and representative articulation of Golden's heart and soul.
- Develop a values-based community vision using information from outreach events.
- Utilize and build on Golden's more tech-savvy staff and population
- Create enforceable neighborhood plans that embody their heart and soul assets and desires
- Direct public/private policies and investments toward achieving Golden Vision 2030.
- Test our approaches in a town close to a large metropolitan city.
- Collect and disseminate lessons and stories to planning practitioners and the general public.

Accomplishments

Project Phases & Participation

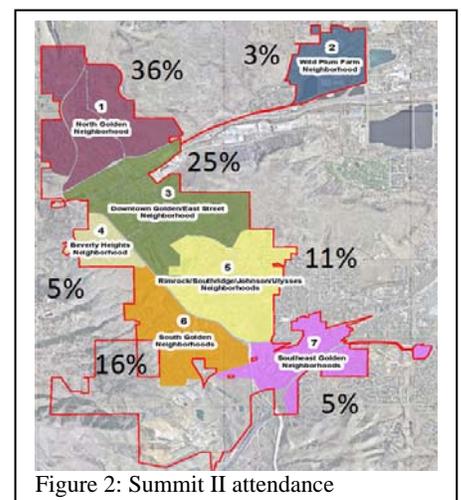
The GV2030 Local Advisory Committee (LAC) successfully organized and completed three important phases: a multipronged story gathering effort; community-wide story listening and value harvesting; and development and validation of core values.

The story gathering/listening phases included dozens of events over a ten-month period where more than 10% of the population experienced tools and processes atypical to land use planning. One such event inspired Golden High School students to create digital place-based stories, then team up with self-selected local notables to capture (using high-definition camcorders) these notables' personal experiences with Golden. Their wildly successful stories not only enabled new relationships to form, but were commissioned by the Park and Recreation Department and the Urban Renewal Authority for use in several grant applications. The youth project was also featured in the school district newspaper, broadening exposure to storytelling and place-based value gathering.

The listening-specific events involved 100 community members analyzing more than 360 stories and harvesting over 2000 value statements. By February 2010, these first two phases concluded (see Figure 1 for a timeline of the process).

The validation phase included two community-wide Summits held in May and June of 2010. At the first Summit, approximately 90 residents used an LAC developed method to synthesize 2000+ value statements into 11 core values and 35 supporting statements. The supporting statements provided local insight about the intent and purpose of each core value. At the second Summit, residents experienced values-based decision-making and tested their core values using Golden-specific scenarios and activities. Two of the three interactive scenarios – redevelopment of South Golden Road and Transit Oriented Development at the south end of town – used Community Viz® (CViz) to demonstrate alternative development options. Professional facilitators and LAC members observed how residents deliberated core values, and then captured key insights about the process of making values-based decisions.

Conservative estimates indicate more than 2,200 people, or 12% of the city's population, have thus far participated in GV2030 events. Keypad results from the second Summit confirmed that not only is representation more geographically diverse (see Figure 2), but participation continues to be mixed: 1/3 of the attendees were new to the project, 1/3 had participated a little, and 1/3 had participated a lot.



Recognition

In April 2010, Golden received a silver award, Fig. 3, for Community Outreach and Public Education from the Denver Regional Council of Governments (the City and County of Denver's new Zoning Code received gold). DRCOG recognized all project partners including LAC members and the Foundation at the awards dinner. Foundation Staff informed the Denver Post about the award to publicize the honor, but these efforts generated no interest. However, we featured the story in our May e-blast to the Foundation's email list. The University of Colorado Center for the Study of Conflict, Collaboration and Creative Governance invited Golden to be the focus of a community-planning track at their Reinventing Governance conference, October 8-10. In addition, the Foundation partnered with Golden and Biddeford to present a session on community voices and visions at the National American Planning Association conference. The Golden project coordinator shared story-gathering experiences, project challenges and solutions, and plans for values-based policy formation. The APA presentation was also featured in our May e-blast.

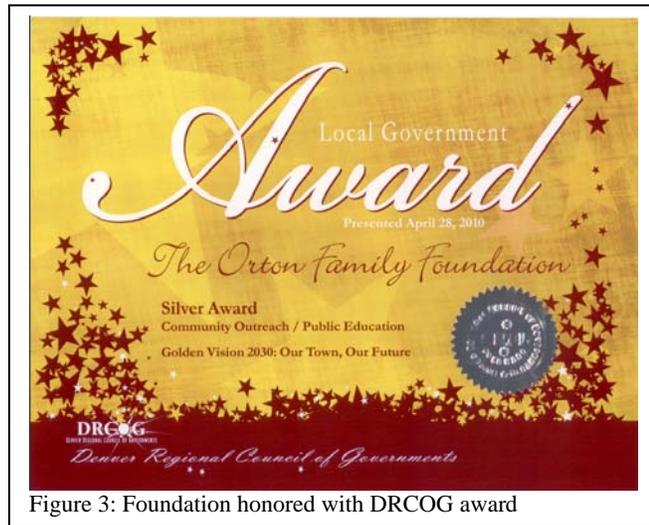


Figure 3: Foundation honored with DRCOG award

Innovative Tools

In December 2009, Golden Staff and several City Council members requested new tools for sustaining relationships initiated at GV2030 events. One tool the Foundation suggested was i-Neighbors, a social networking web site, with which Councilor Marjorie Sloan successfully created a direct line of communication between City Council, City Staff and residents. The Beverly Heights neighborhood site now receives 4-10 posts per day (example post on Fig. 4) and was responsible for the first neighborhood meeting held in mid-June. According to project coordinator Theresa Worsham, i-Neighbors is, “strengthening Councilor-resident relations.”

“...the awesome connection, is fantastic! ...we all need to remain committed to encouraging others to join the site, sharing site information with new neighbors, and "spreading the word" via mouth, realizing some may not be connected through this site.”

– Monica, Beverly Heights neighborhood resident and i-Neighbors member, Golden, CO

Figure 4: i-Neighbors web site post

Challenges

Golden Vision 2030 events continue to be well attended but representation within all areas of the City is uneven. Based on attendance at previous GV2030 events we recognized that a more strategic outreach method was necessary to attract south Golden residents, and we advised Golden to specifically target residents through outreach tactics that have proven effective in the past. Although representation from south Golden areas increased overall from Summit I to Summit II, representation continues to be uneven (see Figure 2).

The primary project coordinator, responsible for the bulk of GV2030 coordination and planning, left her position as Planner in April and her replacement is not expected to begin until late September. The remaining two project coordinators took on her workload but, because they also maintain full time positions, the project is combined with other work demands and priorities.

After the GV2030 Plan is drafted in June, the next two and half months will require a high degree of time and resources to cull feedback from the community. The review period is critical to preserving established trust and accomplishing this will require use of non-traditional public review tools, such as Meeting in a Box, replacing the typical public meeting with a series of community led GV2030 Plan review opportunities. Foundation Staff will continue to provide assistance and encourage strategic planning to ensure project demands are met.

Implementation is an important element of GV2030 and was originally expected to begin prior to project completion. However, given the final adoption of the GV2030 Plan won't occur until late October, implementation through revised policies such as the Comprehensive Plan, Downtown Vision Plan, and several Neighborhood Plans, will not begin until 2011 at the earliest. These revisions relate directly to two specific Foundation Ends statements, adopting "policies, regulations, and processes that honor, incorporate, and enhance its heart and soul" and that "the community holds itself accountable for stewarding its heart and soul..." An active partnership with Golden during the implementation phase would complete our learning experience and enable new processes for values-based decision-making to solidify in Golden.

The momentum necessary to further strengthen the GV2030 process and increase chances of subsequent success can be achieved with a four to six month extension of our partnership agreement. This modification to the original work plan to a June 2011 completion would not require additional funding.

Next Six Months

The next months of GV2030 focus on implementation and stewardship.

- Produce a community supported GV2030 Plan that includes new and existing tools for outreach and public review.
- Develop strategic spending priorities and implementation recommendations by incorporating the community's 11 core values in the Budget Plan and Capital Improvements Plan.
- Create a process for completing and maintaining the Neighborhood Plans. Initial efforts will focus on the South and Central Golden Neighborhood Plans using CViz to analyze alternative planning scenarios.
- Identify methods and design plans for monitoring and reporting progress to the community.
- Expand i-Neighbors and other networking opportunities to the entire City.

What I love most [about this process] is that it is disarming. You talk to people at a basic level, ask what is important to them, what they value. There is trust being built in terms of greater understanding and tolerance of different perspectives. Golden Resident (from Interim Evaluation)

"H&S is helping Golden build its social infrastructure."
Mike Bestor, Golden City Manager

Art & Soul Civic Engagement

Starksboro, VT

Reporting period
July 1, 2009-
June 15, 2010

Partners

Vermont Land Trust;
Town of Starksboro

Other Partners

Vermont Council on the
Arts; Americans for the
Arts, Animating
Democracy Program;
Middlebury College

Staff

Rosenbluth; Kiedaisch

Total Project Budget

\$85,00

Foundation

Contribution

\$55,000; in-kind staff;
consultants; \$5,000 to
Front Porch Forum

Project Duration

Fall 2007-December 2010

Issue Areas

Agriculture; conservation;
community development;
land use

Methods

Art; facilitated dialogue;
storytelling; youth
engagement

Tools

Community Almanac; digital
stories; Front Porch Forum;
keypad polling; publications;
video; web tools

Background

The Foundation and the Vermont Land Trust (VLT) hypothesize that, by getting in touch with deep community values and connections to place, citizens can improve on traditional planning approaches and make better decisions about the future of their town. With help from the non-profit organizations Americans for the Arts (Animating Democracy program) and the Vermont Arts Council, the Foundation and VLT developed an Art & Soul Civic Engagement initiative, with the goal of using the arts and storytelling as a catalyst for collaborative, creative and deep exploration of the community's values, hopes and fears to support residents in planning for their future and translating shared values into action. The Foundation and VLT invited Addison County, Vermont communities to apply through a competitive process, and selected Starksboro in the Fall of 2008.

The Art & Soul project was organized into three phases:

1. Gathering stories in the community around what residents value most about their connections to each other, their community and the land. (Fall 2008);
2. Creating art that allows local residents to explore and reflect on the values and aspects of their community that they cherish most and wish to pass on to future generations. (February 2009 to November 2009);
3. Putting the stories and art into action to implement and sustain the identified values as the town grows and develops. (2010).

Foundation Goals

- Pilot an arts-based process to engage new audiences in a deep discussion of community heart and soul, values and identity
- Explore ways to mitigate the divisiveness of many conservation discussions, opening a dialogue on difficult issues and leading participants to new ways of thinking
- Create a framework for reflection and discovery, creative expression and conversation, ongoing community dialogue and interaction using the arts and storytelling
- Engage youth in multi-generational community conversations and decisions
- Explore use of new tools, including the Foundation's Community Almanac and Front Porch Forum

Following that gathering, community members interviewed another 40 residents between May and October 2009. One of the Middlebury students was also hired by the Foundation in Spring 2009 for an internship to train and support the Starksboro storytelling committee. The committee published stories in the Town's monthly newsletter and partnered with five high school students to interview residents and translate those interviews into portrait projects with the Artist-in-Residence, Matthew Perry.

Also inspired by the Middlebury students, staff from the Robinson School (k-8) attended a Vermont Folklife Center training last summer and began a year-long project with elementary students to interview community members. The student work was featured in an exhibition at the Folklife Center in January 2010.

Art and Dialogue



Artist-in-Residence Matthew Perry engaged residents in exploring their values through art with the help of his Art Bus.

In September 2008, the Foundation issued a Call for Artist Qualifications for the Artist-in-Residence position, and 16 Vermont artists applied. A review committee of project partners qualified seven artists, who were then reviewed by a committee of 19 Starksboro residents. In January 2009, a community committee interviewed three artist finalists in an open public process and, utilizing keypad polling, selected Mathew Perry of the Vermont Arts Exchange to serve as Artist-in-Residence for Phase 2 of the Project.

Matthew spent the first few months of his nine-month residency intensively gathering information. He met with numerous community groups, including volunteer firemen, teens, town boards, school staff, and informal groups of town artists and musicians, farmers, sugar makers, mobile park managers and residents, and merchants.

Leading the various groups through a series of SWOT exercises about the town, Matthew developed a strong sense of how residents feel about Starksboro. All information collected helped to shape ten subsequent community art projects. Some of this information was worked into a "Community Clothesline" project, which



At Town Meeting Day in March, Matthew Perry created a clothesline on which residents could "air their dirty laundry" and express what concerns them about the community.

debuted at Town Meeting in March 2009, allowing residents in town to air key issues by writing them on t-shirts on a clothesline; participants then developed “washing instructions,” or solutions attached to the fabric label. The Clothesline continued to be “aired” at events throughout the project and served as a prompt for further dialogue about Starksboro’s future. Other art activities led by Matthew included sign making at the mobile home parks and community garden, sap bucket painting and auction, a youth photo project, teen portraits, and weekly community landscape painting.



Matthew Perry created large, diamond construction signs to attract residents to Roadside Conversations activities.

In the interviews conducted by the Middlebury College students, residents cited geography a number of times as a barrier to participation in town events and planning. The Art & Soul Committee started mapping geographic neighborhoods by looking at clusters of E911 addresses. This led them to identify locations Matthew’s Art Bus would visit for a series of Roadside Conversations – the focus of his residency. Activities included a potluck dinner, review of the community clothesline, story circles, magnetic poetry, and mapping special places. Each of five Roadside Conversations included a local artist who then took the results of the meeting and created his or her own art for the Phase 2 culminating events.

One of the project goals was to engage the mobile home park residents in town discussions. Matthew was selected in part for his ability and comfort working in these neighborhoods, and it proved to be successful. One of the park residents joined the Steering Committee. Others started to attend Art & Soul events. Outreach and art activities with many of the parks’ youth have continued beyond Matthew’s residency.

Outreach and Communications

Community members had numerous opportunities to express their values, which included surveys and a forum co-sponsored by the Planning and Conservation Commissions, interviews conducted by the college students, the Community Clothesline, and mapping of special places at Roadside Conversations. Eleven values emerged, which were edited and agreed upon by residents who participated in a strategic planning meeting in October 2009.

The Phase 2 art making culminated in November 2009 with a weeklong “Handmade, Homegrown and Harvested in Starksboro” event. More than 400 residents attended celebrations, including a showcase of local musicians at the church, a hoedown barn dance, youth art exhibits and a harvest dinner. Each event displayed the artwork, video and stories created during the project, along with local food, art, crafts and music from Starksboro neighborhoods. The evenings highlighted project results with exhibitions, performances, readings, conversation, an auction, and a concert.

Starksboro's communications subcommittee has worked with the Project Coordinator to maintain an informative project website and to develop a communications plan (with Foundation assistance). The committee is actively using Front Porch Forum and the Town Newsletter to communicate Project events and results. All together, these efforts were successful in drawing out hundreds of residents to activities and events. The local media have also been very supportive.



The third segment of the Art & Soul documentary reveals the community's deep engagement through numerous art projects addressing local issues.

A local filmmaker documenting the Art & Soul process and its impact on the Town is completing the last of three segments that follow each step of the process. The video segments are available on the Foundation and Project websites and are a fitting tribute to the town, the artist's work, and the project's impact on the Town and its residents.

"Despite our town meetings, church potlucks, and the occasional pancake breakfast, those of us in Starksboro who do not live in the village or have kids at Robinson tend to be isolated from the larger community. We're busy with activities in our neighborhoods, buying groceries in Bristol, or working in Burlington or Middlebury, and we just don't get to know all the folks we'd like to. FPF helps us overcome that, reduce neighbor-to-neighbor tension, and build a strong community. It's a little hard to think of someone as an uncaring person when you've seen their entreaty online to come out and help them feed poor folks in the area--or their offer of canning jars to whoever needs them!"

— Ellen Michaud, Blackberry Cottage

In February 2009, Front Porch Forum (FPF) was launched in Starksboro as a part of the Art & Soul project. The Foundation used the opportunity to test this community-building tool in a Heart & Soul process. Within three months, over 200 residents (out of 670 total) subscribed to the online forum for a 30% "take rate." Twelve months later, almost 50% of Starksboro households subscribe to FPF (50% higher than our 12-month goal of 200 households) and participants have shared nearly 1,000 postings. Over 75% of the Starksboro participants are responsible for the FPF content, compared to 10% for typical web 2.0 services.

From Art to Action

As Starksboro moves into the project's third phase, translating the stories and art to action, the Committee has struggled with how to be most strategic and sustainable. As the Committee recently wrote:

Phase 1 felt as though we were led dancing through an exploration of our town's character (and characters) by John Elder's student pipers, drawing in more and more curious residents along the way. Phase 2 represented a bold leap of faith as Mathew Perry probed and played, drove and drew his way across our various neighborhoods, engaging artists, children, elders, and everyone else in a subtle but effective exploration of values.



Local kids designed “Slow Children” signs to combat speeding in mobile home parks.

Phase 1 and 2 were exploratory and experimental... creative in the truest artistic sense. The final November, 2009 celebrations were a huge success—success in terms of bringing this sometimes wayward process to a community-wide recognition that this community is special and talented, that we encourage and value all perspectives, and that community pride, or goodwill, or social capital—whatever one chooses to call it—is a tangible and powerful force that grounds us in our place.

The charge before us in Phase 3 is much different. We must now put this community capital to work. We’ve always had as our goal to use the experience of Art and Soul to enhance our community’s ability to guide its future development, not simply in terms of lots and houses, but also to bolster our social development, our capacity to care and act, to conserve and create, and to grow more resilient even in the face of inevitable change and challenge...So much has been cultivated, fertilized, and now grows. Our challenge is to nurture all of it, somehow, but also to harvest and winnow that which will feed the bones and muscle of our community development. It has not been an easy task.

Included in the application for the Foundation’s final contribution of \$25,000 toward Phase 3 implementation activities are proposals to:

1. Further a network of trails and pedestrian improvements to create a more walkable community;
2. Invest in improvements to the historic schoolhouse to enhance use for community gatherings; and
3. Develop a “Complete Streets” design for the state highway that runs through the Village Center. Although these concepts have been part of the Town Plan, no strategies were ever articulated until this proposal.

In April 2009, Robinson Elementary students and teachers brainstormed about schoolyard redesign and exploration of the qualities of a walkable community. As a result, students have been working on the design for the schoolyard and a network of pedestrian paths. This student work will be incorporated into a comprehensive greenway plan, with the PTO and Conservation Commission as active partners.

In addition to the capital improvements and planning, the Starksboro committee has proposed a series of Neighborhood Conversations to build off of the successful Roadside Conversations. The goal is to have each Starksboro neighborhood host a potluck and facilitated discussion twice each year for several years, focusing on issues of interest to residents or issues that have emerged to date. Potential themes include:

- Exploring interest in a solar power array
- The Town Plan and Zoning, and how they will affect citizens
- Envisioning elderly housing in the neighborhood
- Creating a mini art bus to serve all communities
- Farms and Farmland at risk

In addition to building stronger relationships, envisioning the future and spurring action, the conversations are meant to practice a variety of methods designed to enhance public participation in Starksboro.

Conversations have also begun with the Selectboard to create a permanent coordinator position through Town government that will help continue the momentum and capacity created through Art & Soul.

Challenges

The Art & Soul project celebrated many successes, including: a portfolio of artwork that highlights the artistic and creative talents of residents, especially youth; an increase in community pride in the three mobile home parks and town; improved communication channels about town events and issues; new bridges and bonding between residents of different ages, incomes and backgrounds; and involvement of new residents in Art & Soul.

Yet integrating the Art & Soul approach with town planning activities, involvement of new voices in decision-making, and a coordinated partnership with the Planning Commission are longer-term goals that have yet to be realized. The March elections also saw more old timers elected who have expressed less interest in public process around town planning, fearful of delays and controversies.

Another significant challenge has been the transition of project activities from the Project Coordinator (who left the Project in December) to the volunteer committee. This has highlighted the essential role the coordinator plays, especially in a town with no capacity in existing town government.

Next Six Months

The next six months will include a wide range of activities that both follow up on previous successes and pave the way for Starksboro to translate values into action:

- A community event on July 9, 2010 to allow the community to receive Matthew Perry's final art installation, view Mary Arbuckle's documentary film on Art & Soul, and launch Phase 3 of the project.
- Completion and online posting of Starksboro Creative Yellow Pages
- Summer Art & Soul activities for youth integrated into a mobile literacy program that will be visiting all mobile home parks and other Starksboro neighborhoods
- Construction of a new footpath with volunteer labor on town recreation lands
- Grant applications developed for new arts program funding and bike/pedestrian improvements to sustain Art & Soul activities



Residents enjoyed creating Sap-Bucket Art during sugaring season. The buckets were auctioned off during the "Handmade, Homegrown and Harvested in Starksboro" celebrations in November 2009.

- Submission of request to the Regional Planning Commission to conduct a feasibility study of transforming the Village's Main Street to a "Complete Street"
- Convening of dedicated greenway corridor supporters starting June, 2010, called The Green Corps. Their initial focus will be to spend time networking with landowners to request permission for exploring potential routes to the village and school. They will also devote time to researching and mapping property boundaries and inventorying the physical characteristics of the proposed trail environment.
- Two neighborhood conversation events organized in at least three neighborhoods with organizing teams formed.
- Story gathering, landscape painting and public art installations integrated with trail and pedestrian improvements and neighborhood conversations
- A regional sharing event with Vermont partners to share the experience of Starksboro Art & Soul with Vermont communities, artists and funders
- Evaluation and development of a case study for Starksboro Art & Soul; Animating Democracy will assist the Foundation and post the case study on its national website

"One success of the last two years is that more individuals have joined the circle of community doers. This must be sustained and augmented. (And) using the values Art & Soul has unearthed to help our communities move forward into the future with resolve, compassion and creativity."

—Robert Turner, Art & Soul Advisory Committee

Envision Victor Victor, ID

Reporting period

July 1, 2009-
June 30, 2010

Partners

City of Victor; Teton
Valley Trails and
Pathways, Valley
Advocates for Responsible
Development

Other Partners

Idaho
Transportation Dept.,
Environmental Protection
Agency, Victor
Community Partnership,
Sunshine Engineering,
Placeways

Staff

Carney, Stone

Total Project Budget

\$212,000

Foundation**Contribution**

\$100,000, storytelling
consultant and in-kind staff
time

Project Duration

August 2008-
December 2010

Issue Areas

Civic engagement; conflict
resolution; demographics;
downtowns; economic
development;
transportation

Methods

Communications;
dialogue; outreach;
storytelling; visioning

Tools

Community Almanac;
CommunityViz; design
guidelines; digital
storytelling; events; surveys;
value mapping

Victor's motto is "A Town to Come Home To, Since 1889," and its greatest challenges lie paradoxically, in the fact that so many local youth choose not to come home to Victor, while so many new residents are flocking in.

Like the entire state, and until recently, Victor was growing: while the population in 2000 was just 840, it increased 73% to an estimated 1,454 citizens in 2006 – the first time it breached 1,000 in the City's history. Victor's economy shifted from agriculture toward real estate and recreation. These changes affect land use patterns, threatening the area's environmental integrity and rural character. Numerous farms and ranches have gradually given way to subdivisions, in part because the City has been reluctant to discourage growth or be perceived as infringing on landowners' property rights.

Many of Victor's newest arrivals, like their historic counterparts, are drawn by the striking landscapes and open space. The City's current residents have a strong and historic connection to its founders, who were members of the Church of Latter Day Saints (LDS), or Mormons. Long-time residents now mix with newcomers, including young entrepreneurs, artists and athletes, and the changing population is encouraging the City to consider new ideas about the future and new ways of planning.

Victor approved a Traditional Neighborhood District overlay zone in 2008 with the intent of fostering elements that many Victor residents want: a vibrant community, walkable and bikeable streets, affordable homes, sustainable living, cultural events and close-knit neighborhoods. City officials hope that Envision Victor will help the entire city develop and realize a shared vision for and concrete actions towards building a lively, livable community.

Goals

- Engage all segments of the community including newcomers and long-time residents of the community to describe and articulate the City's heart and soul
- Use storytelling to identify and understand shared place-based values and opportunities for bridging divides
- Compile results from past citizen planning efforts and incorporate them in the Envision Victor planning process
- Ensure that community heart and soul is central to all

- future downtown planning and development initiatives
- Adopt downtown design review guidelines and standards
- Use GIS-based tools for visualization and scenario development for Main Street planning and other growth challenges
- Explore new funding mechanisms such as urban renewal districts, tax increment financing and granting
- Produce and implement a Transportation Plan and Capital Improvements Plan to make Victor a vibrant, walkable, community

Accomplishments

Storytelling work began to taper at the end of 2009 with a full-house event at Pierre’s Playhouse. The event provided a pulse of energy and interest leading into the winter; enough energy that the Storytelling Fellow worked for two additional months helping EV maintain momentum and complete the transition from stories to values and visualization. EV’s interim project evaluation by Peer Associates reported, “storytelling and outreach to the community were successful strategies for promoting more community involvement” and it certainly felt that way during another well-attended public meeting in January 2010 and until the spring. 75 people attended a mid-January event that celebrated work completed in 2009, described the shift into community-wide deliberation about values, and outlined additional work for 2010. The event attracted new interest and participation and demonstrated both keypad polling and Community Viz.



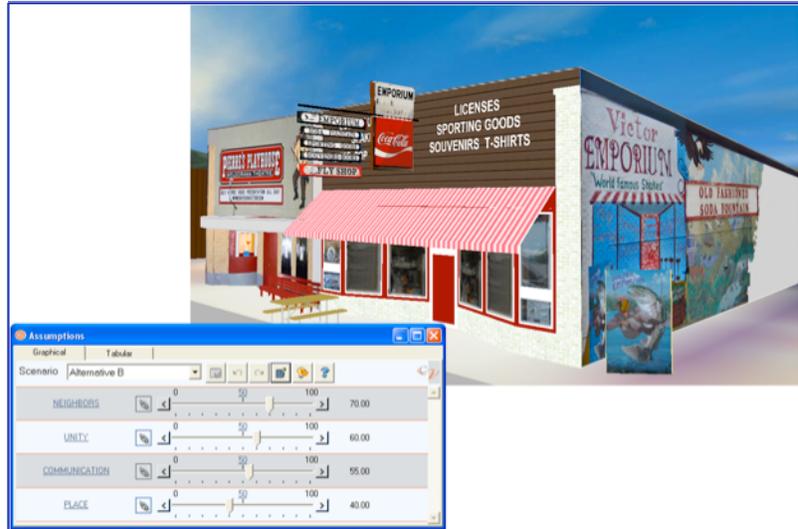
Victor Residents Celebrate Wave Day in January (-20°F)

EV and Placeways collaborated on a 3D model of Victor. During three different and successful public meetings in February (“Virtual Tours of Victor”) the model was used to 1) demonstrate how residents can visualize, and then react to, the designs outlined in Victor’s draft *Transportation Plan* 2) start work on an a comprehensive 3D model of the City that will be used now and in the future, and 3) begin educating residents about the concepts of Community Viz supported value mapping and value indexes.

EV shared early results from storytelling with the entire community and asked for help refining H&S values. Over 250 people participated in a survey designed to validate Victor’s Heart & Soul values. The Foundation has experienced the challenges of articulating values using actionable terms and concepts. However, EV has started to convert Victor’s H&S values into measurable and actionable information through Values Definition Workshops and value mapping. Roughly 80 people (total) including City Councilors, old guard and new comers, attended three nights of Workshops in early April. The goal was converting ‘core values’ e.g. (small town feel, caring

community, sustainability, connected to nature, culturally historic, family friendly) into composite Elements, identify Drivers that support and/or undermine Core Values and ultimately select indicators that foster stewardship of H&S values. The resulting elements, drivers and indicators were delivered to the City of Victor’s contract engineering firm, Sunshine Engineering, which purchased CommunityViz and hired Placeways for a customized training allowing Sunshine to expand Victor’s 3-D model and value mapping model. It’s important to note that the Virtual Tours and the Values Workshops attracted new participation from members of the LDS church (i.e. “long time residents”), people that had not attended EV events previously.

The City of Victor secured \$16,000 from the Teton Valley Humanity Foundation and the USDA’s Rural Business Enterprise Grants program to support Envision Victor. Victor is a finalist for a \$350,000 federal grant to build a new transportation center on the south end of town. The architects selected to design the building intend to apply stories and values collected through EV to design elements of the new building.



Sample of Victor 3D model and assumptions slider

The City selected consultants to produce a Capital Improvement Plan. As part of the selection process consultants were required to agree to collaborate with Envision Victor, participate in Envision Victor meetings when appropriate, and use results from Envision Victor’s value mapping and public input depicted in Sunshine’s 3D model of Victor.

Challenges

It’s fair to continue characterizing Victor as a high-risk, high-reward project. The risk stems from simmering divisions within the community and a longstanding distrust of local government. Victor’s most significant current challenge is suspicion and acrimony from a newly formed and indeterminate sized group of Victor residents called “Victor Voices.” Ostensibly, they formed to have reverse angle parking abolished but the agenda for their first rally included Envision Victor. Victor Voices are rallying the spirit of Glenn Beck (Fox News), he is the guest of honor during this year’s 4th of July celebrations, and they characterize their opposition to reverse angle parking and their suspicion of Envision Victor as resisting unconstitutional and aggressive acts by the government.

Letters to the editor have cast aspersions on Dahvi Wilson, the project coordinator, Mayor Scott Fitzgerald and so on. One Victor Voice member wrote that they hope Glenn Beck's appearance "makes your lives here increasingly more [sic] uncomfortable, until you can get on board with the constitution or go somewhere that actually supports your liberal views."

STOP BACK-IN PARKING RALLY
WEDNESDAY, APRIL 28TH, 2010
AGENDA

Welcome and thank you for coming! It is a great thing when a community can come together even over something our Mayor considers as trivial as "the direction of their car on the street". Those of us that are here understand that this is about more than just whether we reverse in or out of our parking spot. We are encouraging everyone to be

Excerpt from flyer announcing Back-In Parking Rally

This is neither fiction nor paranoia nor rational. Envision Victor had nothing to do with reverse angle parking though the City is a project partner. To counter this assault Dahvi convened project partners and a select group of influential old guard EV supporters. The group included David Kearsly a former City Councilor and bishop in the LDS church and newest member of the EV project committee. The group confirmed that EV has unfairly been assailed by Victor Voices. The group convened by EV described Victor Voices as the most recent illustration of long-standing distrust of local government and discomfort with new arrivals and agreed that leaders of Victor Voices should not be ignored.

Next Six Months

- EV will engage Victor Voices leaders with the help of old-guard EV supporters.
- EV will develop a new public message campaign that clarifies the purpose of EV, emphasizes the values the community has identified, and makes clear why and how the values will be applied.
- EV will use these circumstances to attract new participation in the remainder of EV.
- In August, EV is hosting a Partners Retreat to finalize how EV will continue after the Foundation's involvement ends.
- Public meetings in August, September, and October will use facilitated discussion and the new CViz model to apply H&S values to Main Street design and the Capital Improvements Plan.

Completion Date: Recent challenges notwithstanding, EV remains committed to formal ending date of late December 2010. Dahvi paraphrased a former county Commissioner, long-time resident and EV supporter who shared encouragement last week by saying "I don't think we're in that big of a hole and Envision Victor is exactly what we need to be doing."

Heart & Soul has made a huge difference to our younger population. They're an active group who we haven't seen much of until this started. We are also getting older residents more involved in the process and what is going on. That's the group that we're working on to encourage them to come out a little more. The storytelling and values have gotten them out some.
Interim Evaluation, PEER



Growing with Heart and Soul: *Building a Future for Values-Based Planning*

A Convening Held by the Orton Family Foundation

Denver, October 5, 2010

Bios of Invited Attendees (in alphabetical order starting with last names)

Steven Ames, Principal of Steven Ames Planning, Portland/Bend, Oregon

Described as an “architect of public process,” Steven Ames is a consulting long-range planner recognized for his work in the area of community and regional visioning. He is the author of *A Guide to Community Visioning*, published by the American Planning Association (APA) and innovator of the Oregon Model, a strategic approach to visioning employed by cities and towns across the country.

Steven has advised two generations of visioning projects for the City of Portland, and worked with scores of other communities in Oregon and throughout the western U.S. His most recent award-winning project is the *Columbia Gorge Future Forum*, a regional visioning process engaging the 13 communities and tribes of the Columbia River Gorge in Oregon and Washington.

Steven has also consulted with local governments and communities in Canada, New Zealand and Australia. Steven conducts visioning master classes and speaks on the relationship between civic vision, urban redevelopment and sustainability. His recent writings include a chapter for APA’s new reference work, *Planning and Urban Design Standards*.

Christian Gibbons, Director of the Business/Industry Affairs in Littleton, Colorado

Christian is co-inventor of “economic gardening,” an entrepreneurial approach to economic development. Mr. Gibbons received a Master’s Degree in Urban and Regional Planning from the University of Oklahoma in 1973. He worked for the City of Oklahoma City, San Bernardino County, California and owned a consulting firm in Evergreen, Colorado before joining the Littleton staff in 1987. He and his wife Diane have been married for 42 years and they have two adult sons.

Jim Kent, President of the JKA Group, Basalt, CO

JKA Group has three enterprises: James Kent Associates, a public policy consulting firm; Center for Social Ecology and Public Policy, a non-profit that builds public policy from social ecological concepts; and Natural Borders, a human geographic mapping company. Jim is a global community organizer with extensive experience in successfully implementing economic redesign by providing comprehensive assistance to individual and family enterprise start-ups in rural and urban areas. Jim has presented at hundreds of universities, policy forums, and conferences focusing on bio-social ecosystems, national environmental policy, policy formation and implementation, culture-based enterprise development and citizen-based collaboration.

Ethan Kent, Vice President at Project for Public Spaces, NY, NY

Collaborating with local communities around the world, Ethan Kent has been integral to the development of Placemaking as a transformative approach to community development, planning

and urban design. Over 12 years at PPS, Ethan has worked on, evaluated and photographed public spaces in at least 50 cities and 10 countries every year.

Ethan has worked on more than 200 Placemaking technical assistance projects working to re-envision and activate key public spaces such as Portland Oregon's Pioneer Courthouse Square, Times Square in New York, Kennedy Plaza in Providence, RI, Garden Place in Hamilton, New Zealand and Sub Centro Las Condes in Santiago, Chile.

Utilizing lessons learned through his project work, Ethan regularly conducts trainings to build Placemaking capacity and strategic plans for cities. He has conducted these training workshops in cities in 5 continents, including more than 20 in Australia and New Zealand.

Ethan's graduate and undergraduate work is in sociology, environmental studies and economics. He explored local development issues in the context of globalization during a year of travel around the world as a participant in the International Honors Program. He attributes his Placemaking education to the communities he has worked with, and to his father, Fred Kent, who founded PPS.

Charles Marohn, Jr. , President of Community Growth Institute, Brainerd, MN

The Community Growth Institute is a planning organization that works with small towns and rural areas. Charles is a Professional Engineer (PE) licensed in the State of Minnesota and a member of the American Institute of Certified Planners (AICP). He has a Bachelor's degree in Civil Engineering from the University of Minnesota's Institute of Technology and a Masters in Urban and Regional Planning from the University of Minnesota's Humphrey Institute.

Charles is a member of the National Society of Professional Engineers, the American Planning Association and the Congress for the New Urbanism. He is active in Republican politics, a member of the Discovery Woods Charter School Board, served on the East Gull Lake Planning Commission, was a member of Governor Pawlenty's task force examining the state's shoreland regulations, a veteran of the Minnesota Army National Guard and a regular on-air contributor to KAXE. He lives with his wife and two daughters north of Brainerd.

Ed McMahon, Senior Resident Fellow at the Urban Land Institute, Washington, D.C.

Ed is an attorney, community planner, lecturer and author; he currently holds the Charles Fraser Chair on Sustainable Development at ULI. Before joining the Urban Land Institute in 2004, Ed spent 14 years as the Vice President and Director of Land Use Planning for The Conservation Fund. He is also the co-founder and former President of Scenic America, a national non-profit organization devoted to protecting America's scenic landscapes.

Before Scenic America, Ed taught law and public policy at Georgetown University Law Center for nine years and served in the U.S. Army at home and overseas. He is the author of 15 publications and over 150 articles, including: *Ten Principles for Smart Growth on the Suburban Fringe* (ULI, 2004); *Green Infrastructure: Connecting Landscapes and Communities* (Island Press, 2006); *Land Conservation Financing* (Island Press, 2003); *Better Models for Commercial Development* (Conservation Fund, 2004); and *Balancing Nature and Commerce in Gateway Communities* (Island Press, 1997). He also writes regularly for *Urban Land Magazine*, *Planning Commissioners Journal* and other periodicals. His latest work, *Conservation Communities*, was released in August 2010. Ed

has an M.A. in Urban Studies from the University of Alabama and a J.D. from Georgetown University Law School.

Lyman K. Orton, Co-founder, Orton Family Foundation, Steamboat Springs, CO.

Lyman Orton is the Co-founder and Chair of the Orton Family Foundation. He is also the Proprietor of The Vermont Country Store, Inc., a retailer selling through two stores, nationally distributed catalogues and the Internet. The business is located in Vermont, employs over 600 people and actively supports local communities with contributions and employee-led volunteer programs. Lyman established the Foundation in 1995 to help the citizens of rural America better define and shape the future of their communities. The Foundation is funded with profits from The Vermont Country Store.

Lyman became interested in land use issues through serving on the Planning Commission of his hometown of Weston, Vermont, and recognized the need for more comprehensive tools and processes to help community leaders and the citizens more easily make sense of defining and shaping the long-term growth of their communities. Lyman graduated from Middlebury College in 1963 where he became an anti-billboard activist because of a sudden proliferation of monstrous red billboards along Route 7 advertising a shack that sold seashells. The shock and outrage among Vermonters over those signs led to Vermont banning all off-premise signs in 1968. Lyman now serves on the boards of Scenic America in Washington, DC and The Community Agriculture Alliance, Steamboat Springs, Colorado. He was instrumental in Vermont's recent adoption of a "Right to Dry" law and spearheaded the innovative "Art of Action" project in Vermont, engaging 10 artists in depicting issues of importance to the future of Vermont.

Chris Overdorf, Principal in Jones & Jones, Seattle, WA

Chris is a landscape architect and planner with more than 20 years of experience in a broad range of land use projects. His work includes planning and design, urban design, environmental art, park and recreation design, visual impact assessment, stream restoration, and transportation planning. A strong proponent of the application of digital technology to land use design, he has extensive knowledge in 3D modeling and animation, terrain modeling, software programming, GIS, database modeling, and GPS.

He attended the United States Military Academy at West Point, where his fields of study were both computer science and remote sensing. While at West Point, he was involved with the continued development of the Landsat satellite mapping application. He then received his degree in Landscape Architecture from Washington State University.

Chris serves as President of the American Society of Landscape Architects, Washington Chapter. He is also a member of the American Planning Association (APA), the Construction Specifications Institute (CSI), the National Institute of Building Sciences National CAD Standards Committee, and the National ASLA Professional Practice Institute Committee.

Bill Roper, President and CEO of the Orton Family Foundation, Middlebury, VT

Bill has been with the Foundation since 1998, serving as its Director of Programs until 2006 when he became its CEO. After graduating from Williams College in 1977, Bill traveled around the world for two years, eventually settling in Vermont and graduating from Vermont Law School in 1983.

For the next 14 years, he practiced law in a private firm in Middlebury, Vermont and became a prominent land use attorney focusing on creative and thoughtful local community planning, as well as on sound economic and environmental development in the private market. In 1997-1998, Bill lived with his wife and two daughters on the west coast of Ireland where he spearheaded changes to Ireland's land use practices and regulations, helped form Ireland's first land trust and worked on several local projects. He has written articles for the Boston College Environmental Affairs Law Review and the Vermont Law Review and has authored a chapter on the Foundation's groundbreaking planning software for the edited volume, *Conservation in the Internet Age* (Island Press, 2002). Bill lives with his family in Weybridge, Vermont, continues to travel whenever he can, and serves on the Weybridge Planning Commission and the board of the Smart Growth Vermont. As an avid cyclist, one of his goals is to finally pass his board chair, Lyman Orton, on a mountain pass.

Bonnie Shaw, Founder and Director, BYO Consulting, Washington, DC

Bonnie is digital native, and an expert at making meaningful connection between people, place and technology. As a Director of BYO consulting, she approaches the social web from a fresh perspective with a background in urban design and local community building, and online organizing and strategic technology engagement.

Bonnie has over 9 years of international professional experience in design, strategy, and project management in local grounded and global online projects. In 2006 she was a founder of the global photographic treasure hunt and community engagement game: Snap-Shot-City.com - a ground breaking integrated technology event played around the world. Prior to founding BYO, Bonnie was employed with leading web thinkers EchoDitto.

Bonnie has degrees in Landscape Architecture, Planning and Design, and a Masters in Urban Design. She started her career designing cities and building civic engagement in disadvantaged communities in Australia and around the UK. She is passionate about serious play, and strives to inject lively creative collaboration processes to drive rigorous and implementable results. Bonnie regularly blogs at the intersection of people, place and technology, she was a guest researcher at MIT's Senseable Cities Lab in 2008, and regularly presents on technology and online/offline community engagement, serious gaming, and digital storytelling at conferences around the world.

Phil Stafford, Director, Center on Aging and Community at Indiana University, Bloomington
A cultural anthropologist, Phil has been active in research, practice, teaching, and writing about culture and aging for 35 years. Now he also has the privilege of knowing aging first hand! He has been a leader in the movement towards elder-friendly communities and consults with many communities around the U.S., employing participation methods to focus discussion around aging and place. His most recent book is *Elderburbia: Aging with a Sense of Place in America* (Praeger, 2009).

Phil has his BA from the University of Chicago and his Ph.D. in Cultural Anthropology from Indiana University. He and his wife Linda have chosen to age in place in their 1840 farmhouse outside of Bloomington.

Elizabeth Storer, President and CEO of the George B. Storer Foundation, Jackson, WY

The George B. Storer Foundation is a family foundation that funds conservation and sustainable community efforts in Wyoming and the west. Prior to taking this position, Liz ran her own communications and marketing consulting business with an emphasis on natural resource matters in the western United States, providing advice to clients on land exchanges, federal and state environmental permitting and conservation easements.

Liz has served on the boards of several public policy, education, and conservation organizations, including the national board of Trout Unlimited, Emma Willard School, Wyoming Outdoor Council, the University of Wyoming's Ruckelshaus Institute for Environment and Natural Resources, UW's American Heritage Center and the Wyoming chapter of the Nature Conservancy.

Liz's political experience includes lobbying the Wyoming legislature on conservation issues in the mid-1990's, running for state legislative office in 1996 and producing television and radio spots for Governor Dave Freudenthal's campaign in 2002. She holds B.A. and M.F.A. degrees from the Cinema School at the University of Southern California.

Karen True, Community Engagement Consultant, Seattle, WA

Karen engages community stakeholders – private, public, nonprofit and citizens – to make gathering places vibrant spaces. She cultivates creative use of the space in programmed and spontaneous ways, and helps develop infrastructure and systems to make each model sustainable.

Most recently, Karen worked with Ron Sher and Third Place Company in the Seattle area. She now consults independently and speaks nationally, most recently at Louisiana's Smart Growth Summit, about the potential of "happening places". Karen serves on nonprofit boards and committees in the Seattle area and is the chair of Friends of Third Place Commons.

Milan Wall, Co-Director, Heartland Center for Leadership Development, Lincoln, Nebraska

Milan is a management and communications expert with more than 40 years experience in dealing with the critical issues facing American society and culture. Mr. Wall has been a newspaper reporter and editorial columnist, a university lecturer and a speaker at regional and national conferences on such topics as educational leadership, economic development, and uses of technology in education. Before he helped found the Heartland Center, he was Executive Vice President of the University of Mid-America, a multi-state consortium that was recognized internationally for its imaginative approaches to adult education.

With Dr. Vicki Luther, he is co-author of a number of publications on leadership and community development, including *The Entrepreneurial Community: A Strategic Leadership Approach to Community Survival*, *Clues to Rural Community Survival*, and *Eight Challenges Facing Community Leaders*. Previously, he served as editor of the *Nebraska School Leader*, which won three national awards for excellence among state publications on education during his tenure. In 1993, Mr. Wall was honored with the Award of Excellence, the distinguished alumni recognition of the University of Nebraska-Lincoln Teachers College.

Jacob Smith, Mayor, Golden, Colorado

Jacob Smith currently serves as Golden's 46th mayor. He is a former member of the Golden Historic Preservation Board and was first elected to fill a vacant city council seat in a special

election in March 2005. He was reelected in November 2005 and then elected as Mayor in November 2007. He graduated from Smoky Hill High School in Aurora and later received a Master's degree in public policy from the University of Colorado. He represents Golden on the board of the Denver Regional Council of Governments, is a member of the executive committee of the Metro Mayors Caucus, and earlier this year received a Gates Family Foundation Fellowship to attend the Kennedy School of Government's "Senior Executives in State and Local Government" program. Most of Jacob's professional experience has involved working for and running nonprofit organizations, and he currently works for a Colorado-based non-profit that helps cities and towns around the country become more sustainable and livable

Anthony C. Wood, Executive Director, Ittleson Foundation, New York

Tony is a preservation activist, writer, teacher, historian, and grants maker. Since 1993 Tony has been the Executive Director of the Ittleson Foundation. Prior to that he served as the Chief Program Officer at the J. M. Kaplan Fund and worked at the Municipal Art Society. He is an Adjunct Assistant Professor of Historic Preservation in the Columbia University Graduate School of Architecture Planning and Preservation. He holds a Master of Urban Planning from the University of Illinois, is a graduate of Kenyon College, and was a Historic Deerfield Summer Fellow.

Tony is actively involved with a wide array of preservation and conservation organizations. Currently he serves as a trustee of the Orton Family Foundation and as Chair of the Drayton Hall Site Council. He has served as Chair of the Preservation League of New York State, is an Advisor Emeritus to the National Trust for Historic Preservation, is former Chair of Partners for Sacred Places, is Chairman Emeritus of the Historic Districts Council of New York City, and is the founder and Chair of the New York Preservation Archive Project. He is the author of *Preserving New York: Winning the Right to Protect a City's Landmarks* (Routledge, 2007). He lives in New York City.