



Phase 3: Plan

Community Workbook

Community Heart & Soul®

Cover Photos

Top left: The Fort Lawn Heart & Soul Team reviews the Heart & Soul Milestones in Fort Lawn, South Carolina

Top Right: Residents share their ideas in Meadville, Pennsylvania

Lower left: Community Heart & Soul Idea Summit in Meadville, Pennsylvania

Lower Right: Essex Heart & Soul comes together at a community event in Essex, Vermont

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Phase 3: Plan

The Fort Lawn Heart & Soul Team reviews Heart & Soul Milestones in Fort Lawn, South Carolina

Learning Objectives

1. Use multiple methods to gather and prioritize action ideas in the community
2. Gain community support for action ideas and ongoing commitment to Heart & Soul
3. Create an action plan with shared community ownership for implementing prioritized action ideas

Project Roadmap Milestones

- Continue to promote and share Heart & Soul Statements across the community
- Meet with town officials, partners and organizations to talk about how their work aligns with the Heart & Soul Statements
- Pull action ideas from stories and gather additional action ideas throughout the community, using Heart & Soul Statements as a framework for multiple gathering methods
- Prioritize action ideas with broad community input
- Begin drafting Community Action Plan with help from municipal and community leaders, community partners, and potential implementers to build shared ownership for prioritized actions
- Identify key implementers of the Community Action Plan and begin stewardship planning
- Reflect and celebrate!

Focused-in Trainings

Strategizing for Action Planning

Our Heart & Soul Statements are Finalized... Now What?

Heart & Soul Statements are used every step of the way in Phase 3. That's why it's so important for your Statements to be finalized before you embark on gathering and prioritizing action ideas or forming an action plan.

Heart & Soul Statements also have a life well beyond Phase 3. How and by whom?

The long-term goal is for your Heart & Soul Statements to inform decision-making by local government and local organizations into the future because they are a guiding representation of what matters most to the community.

During Phase 4, City Councils are urged to pass an **official resolution** recognizing the Heart & Soul Statements and the intention to have them guide decision-making. In a number of communities, the Council has posted the Statements in their chambers to keep them fresh and refer to as they are discussing community topics. Heart & Soul Statements can also make their way into Comprehensive plans and other city documents. Local community organizations and groups often adopt them to show how their work connects to the themes residents say matter most. In this way, they can demonstrate their progress on strengthening those themes in the community through tangible activities and projects.



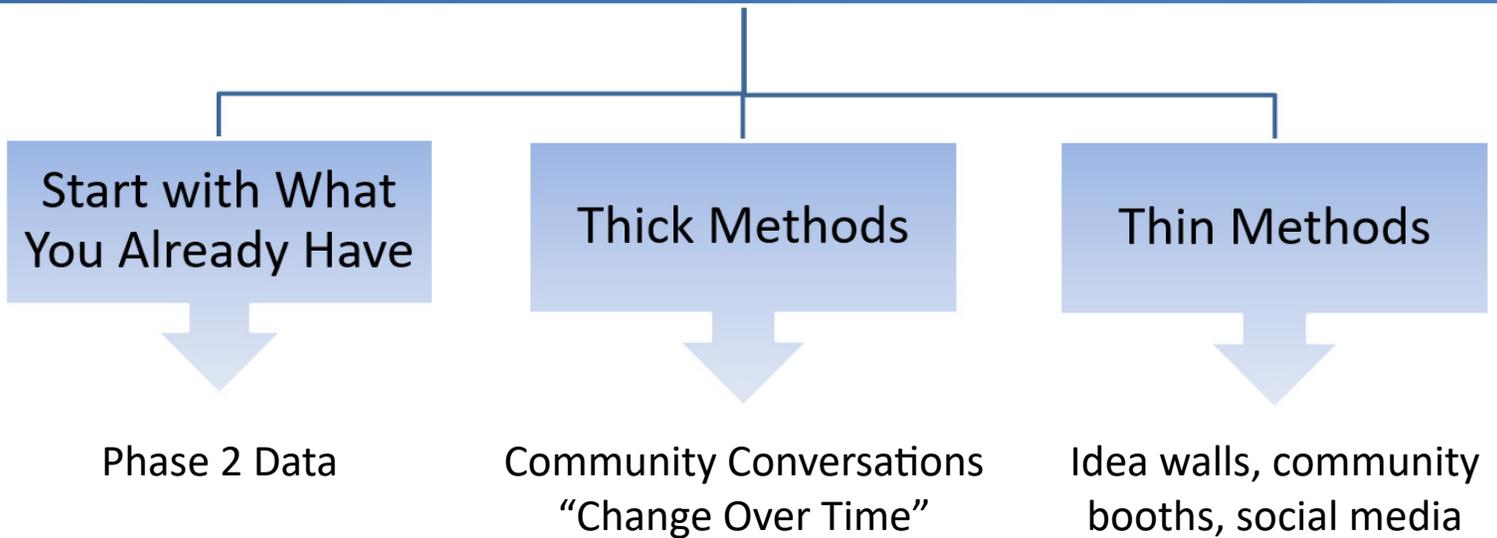
Gathering Ideas for Action

Action ideas are potential projects and initiatives that will strengthen what matters most to the community. Since your Heart & Soul Statements clearly express what matters most, calls for action ideas should always be connected to your **Heart & Soul Statements**.

When gathering action ideas, you'll continue to involve as many people and different voices as possible by revisiting and expanding your **Community Network Analysis**.

Gather Ideas the Heart & Soul Way

Involve Everyone ◊ Focus on What Matters ◊ Play the Long Game



1. Start with Action Ideas You Gathered in Phase 2

You already have a great start on gathering ideas! What have you already collected and organized as “Ideas for Action” in your Project Spreadsheet under the Thin Data and Thick Data tabs? How do those ideas fit into your Heart & Soul Statements? How many ideas have been gathered, and what community demographics are represented in your collection of action ideas? Have a look in your Project Spreadsheet to find out.

Here are some questions to help you think about your collection of action ideas:

- How full and specific is your collection of action ideas?
- Where are the gaps? Do you need more ideas and discussion for particular Heart & Soul Statements? Do you have a lot of general ideas that could benefit from greater specificity? Are there missing groups you still need to reach out to so their ideas for action get considered, too?
- Who else should you be talking to in this phase?
- What methods will help you gain further meaningful input while continuing to spread the word about Heart & Soul, build relationships, and get people talking about action ideas based on what matters most?



Community conversations in Meadville, Pennsylvania



*Gathering ideas for action in Ambridge, Pennsylvania
Photo credit: Rustbelt Mayberry Photography*

Consider Local, Regional, and National Trends

What are some of the trends you should be paying attention to in your community? What connections can be made between **community conditions or concerns** expressed in your story gathering phase and **factual trend data**?

Trend data is not just a single observation at one point in time. It shows facts about how something has shifted over a period of time affecting many people. Trend data might also show comparisons to another community or the country's average to provide further insights.

For example, what conditions are rising or declining in your community? How do these conditions relate to your Heart & Soul Statements which are a reflection of what people say “matters most”?

- Overall Population
- Population of specific demographic categories such as age and race/ethnicity
- Housing prices
- Unemployment rates/employment opportunities for certain demographics such as young professionals
- Access to broadband
- Healthcare access
- Food security
- Affordable childcare options
- Public transportation
- Aging in place
- Incarceration rates
- Economic activity on Main Street/Downtown district
- **Other:** Additional conditions related to your Heart & Soul Statements/themes

By deepening your understanding of the drivers of change affecting your community, trend data helps you not make decisions in a vacuum. What simple charts might the team prepare around local, regional, or national trends? Can you get some existing trend data from your local planning staff or local organizations and non-profits that specialize in addressing a particular community condition? Who might you reach out to in your community?

It is useful to think about and prepare trend data early in Phase 3 so you have it ready to share when you are discussing actions ideas, prioritizing them, and even creating your action plan.

Helpful Resources for Trend Data

- **Headwaters Economic Profile System:** <https://headwaterseconomics.org>

Headwaters Economics generates reports on a range of topics including local economics, demographics, and income sources while providing historic context and trends. Headwaters is one of the best sources for data at the town level.

- **MySidewalk:** <https://mysidewalk.com>

With a paid subscription, MySidewalk will work with towns to integrate their own data from various studies and surveys. For example, the City of Kansas City added crime data from a citizen satisfaction survey to compare feelings of safety with documented crimes.

- **Gallup:** <http://www.gallup.com>

Gallup provides insight on public opinions about the economy, politics, employment, and well-being. These articles can be helpful for understanding conditions that impact perceptions about local issues. For example, this article provides information on perceptions of social class: <http://www.gallup.com/opinion/polling-matters/204497/determines-americans-perceive-social-class.aspx>.

- **Pew Research Center:** <http://www.pewresearch.org>

Pew is a nonpartisan fact tank that informs the public about the issues, attitudes, and trends shaping the United States. They conduct public opinion polling, demographic research, content analysis, and other data-driven social science research.

- **Local and State Departments**

Many state and local government agencies can provide trend data around various topics. Check with agencies in your area to see how they can help.

MY NOTES:

2. Thick Method for Gathering Ideas: Community Conversations Using “Change Over Time”

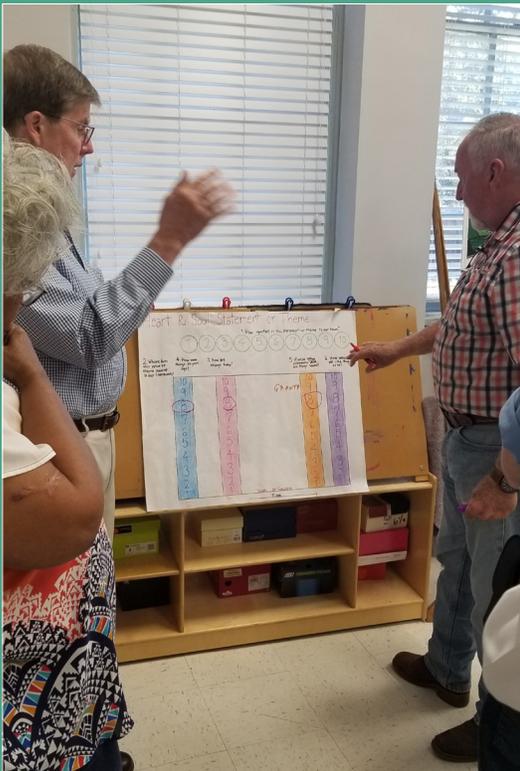
Just as in Phase 2, both “thick” and “thin” approaches can be used for gathering actions ideas in Phase 3. Thick methods (conversational, two-way) are preferred in Phase 3 so you can build relationships, get more detailed information, and open up opportunities for discussion and collaboration on the future of your community. Hosting a series of structured community conversations with different groups, at different times, and in different parts of the community allows you to involve new people. In addition, community conversations achieve the following:

- a) Generate a deeper understanding of the Heart & Soul effort throughout the community
- b) Get neighbors talking to neighbors about the finalized Heart & Soul Statements
- c) Collect specific ideas for action grounded in what matters most.

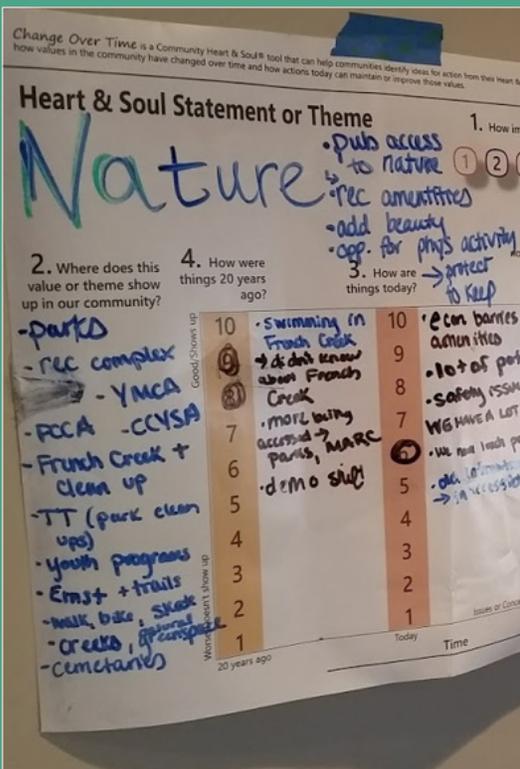


Tips for Community Conversations to Gather Action Ideas

- Take your idea gathering conversation series “on the road” to various community groups, clubs, and organizations.
- Send open invitations to gather on Zoom, in a library meeting room, a quiet corner of a coffee shop, an outdoor venue, or a community member’s living room. Wherever they are held, make it a comfortable and welcoming environment!
- Have a facilitator lead the discussion and a note-taker to record action ideas
- Use a consistent focus and structure such as the “Change Over Time” tool (learn more about it on the next few pages)
- Provide a brief background of what led up to this moment (your Heart & Soul work thus far), the purpose of the conversation, and the Heart & Soul Statement(s) you will be focusing on in the conversation. Allow people to introduce themselves before you dive in.



Change Over Time in Fort Lawn, South Carolina



Exploring the theme of "Nature" in Meadville, Pennsylvania

Change Over Time is a Community Heart & Soul® tool that can help communities identify ideas for action from their Heart & Soul statements. This tool helps to visualize how what matters to your community has changed over time, and how actions today can maintain or improve what matters to your community.

Heart & Soul Statement or Theme

1. How important is this statement or theme to our town?

- ① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩

2. Where does this theme show up in our community?

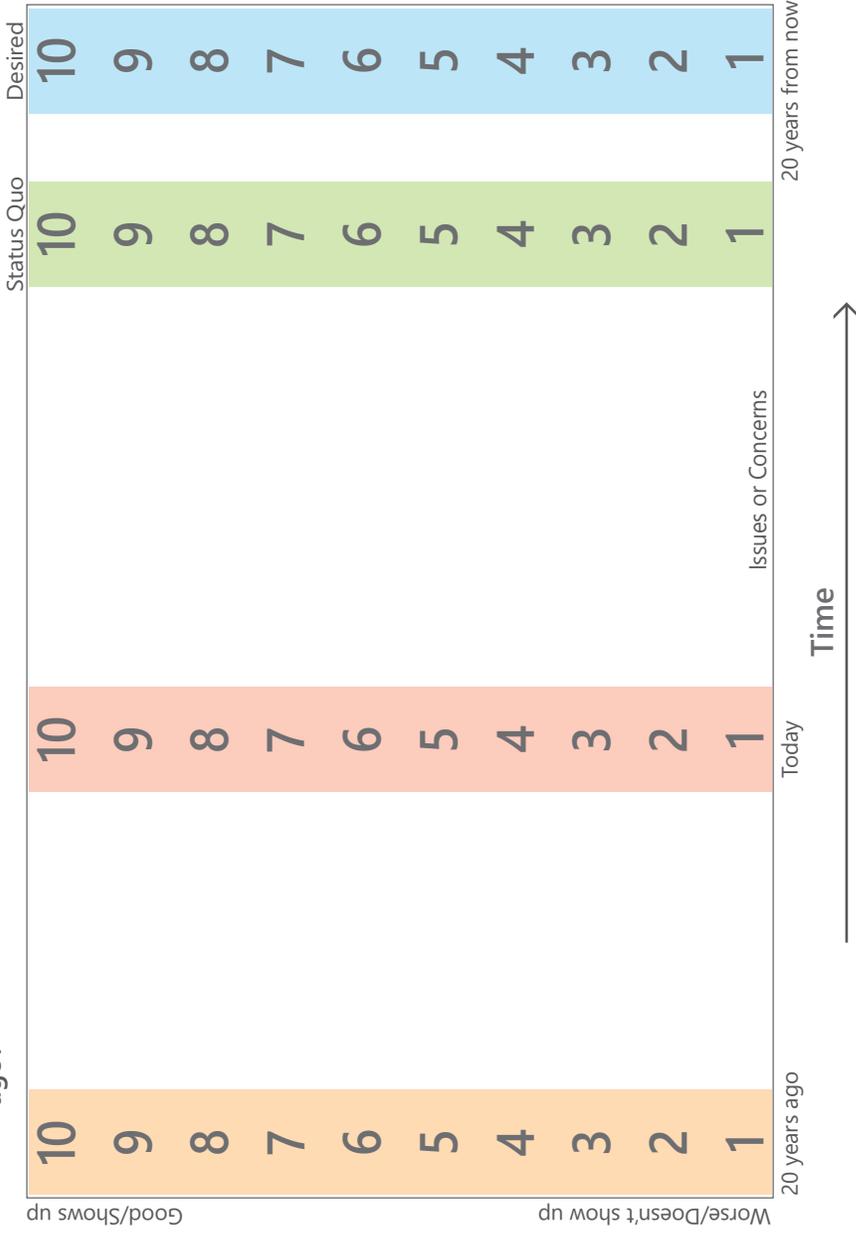
4. How were things 20 years ago?

3. How are things today?

5. If we do nothing differently, where are things headed?

6. How would we like things to be?

7. Capture ideas for action here



How to Use the Change Over Time Tool

Change Over Time is a discussion tool that helps community members generate informed ideas for action, framed by your Heart & Soul Statements. It prompts participants to look at how elements of your community have shifted over time and the trends that may affect the future. Change Over Time is perfect for structuring community conversations!

Steps to “Change Over Time” Discussion

Start by writing a Heart & Soul Statement at the top of the chart. Then ask and discuss responses to the following questions in the order they are presented.

Step 1: Heart & Soul Statement Importance

How important is this statement or theme to our town/community? As a group, think about how you would rate this statement on a scale of 1-10 with 1 being "not important" and 10 being "very important." Can you come to a consensus as a group? Put a circle around the agreed upon number. If the group can't come to a consensus, be sure to mark the outliers of the consensus on the number continuum.

Alternately, you can approach this from an individual standpoint where each person circles the number they think best expresses how they would rank the statement on the scale. (If doing virtually, you might ask people to respond to a poll, do a round robin of oral responses, or ask them to annotate the chart.) Then you can highlight or mark the *average* of the responses.

Step 2: Indicators of Where and How this Heart & Soul Statement/ Theme Shows Up

This is a place to reflect on where you see this Heart & Soul theme being reflected in the community. What positive things are already happening? Write down examples as they are offered. If there are indicators that this theme does not show up positively, record those examples at the bottom of the list.

Step 3: Today's Snapshot

Now you are jumping ahead to the middle of the chart to think about how things are today. Based on the conversation you just had about where this theme shows up in the community and what might be missing, how would you rate the way things are today?

Allow some time for discussion and follow same procedure for highlighting the consensus or average of individual responses. Again, if participants don't come to consensus, be sure to acknowledge and record the outliers on the chart.

In the blank space to the right of the scale, write down any issues, concerns, or examples that illustrate how things are today.

Learn how to use the Change Over Time tool by watching this video: <https://vimeo.com/232480257>

Step 4: 20 Years Ago

Now you are moving to the left of the chart again. Yes, it is correct that column 4 appears before column 3! Think about what things were like 20 years ago. If some participants have been in the community less than 20 years, that's okay. Think back as far as you can. How were things in the past?

After your conversation, mark the consensus number or average on column 4. Again, if you don't come to consensus, be sure to acknowledge and record the outliers on the chart.

Also, record any examples that represent the way things used to be, including notes about any businesses, public buildings, or key landmarks that were just opening.

Step 5: The Status Quo Future

If we do nothing differently, where are things headed?

Have participants think about 10-20 years in the future when responding to this question.

Are conditions related to this theme likely to improve or decline if we do nothing differently? What indicators do you have of this? This is a good place to bring in any relevant data you've gathered on local, regional, or national trends. What implications do those data have for your community? After your conversation, mark the consensus number or average on column 5. This step is used to illustrate that change will likely happen, even if residents choose to take no action at all. Doing nothing does not mean that things will stay the same!

Step 6: The Desired Future

How would we like things to be 20 years from now? What do you think?

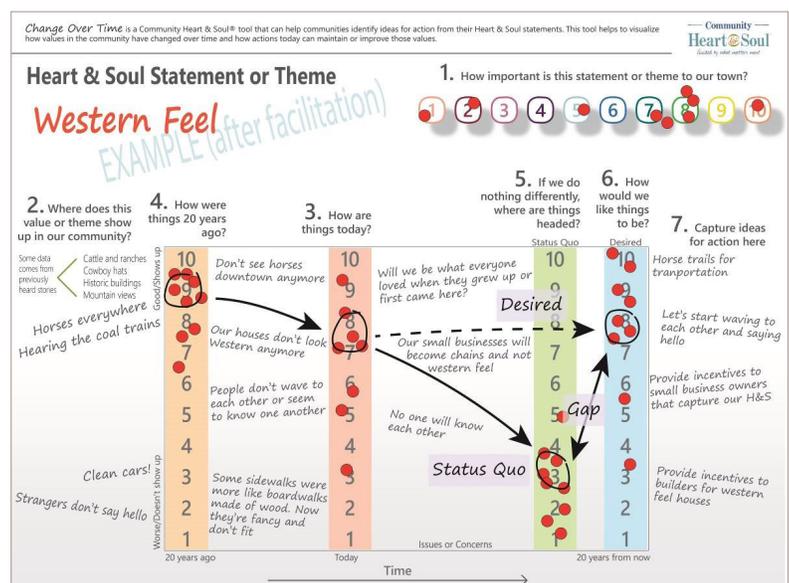
Have a conversation and then highlight the number by consensus or average. If there is not consensus, acknowledge and record the outliers on the chart.

Next, illustrate the change over time by drawing arrows from left to right connecting the column scores from past to present to status quo to the desired future. Often, participants will rate the desired future a higher number than the status quo future. If there is a gap between where things are headed and the desired future of the community, point this out. How big is the gap? How urgent is taking action to move towards the desired future?

Step 7: Capture Action Ideas

Based on the conversation about where things are headed and our desired future for this Heart & Soul Statement, what ideas do we have about moving things towards the desired future? Are there things we need to re-commit to or ensure we're still investing in? What new action ideas will move us in the right direction?

As the group comes up with ideas for action, write them under Step 7. You may need a separate sheet to record all of the ideas!



Planning Community Conversations with the Change Over Time Tool

Your Heart & Soul Team can use Change Over Time to facilitate conversations all over your community! Here are some tips to help you get organized as you plan a fun and engaging community conversation with Change Over Time.

Supply Checklist:

For Community Members

- Agenda
- Snacks and refreshments
- Hot chocolate for cold days, lemonade for summer days, bottled water
- Popcorn, crackers, cookies, something local
- Markers or stickers (to mark their ranking)
- Paper and pens or pencils for notetaking (helpful, but not required)
- Copies of Heart and Soul Statements
- Demographic slips

For the Host

- Agenda
- Clock or time to keep meeting on time
- Host's Guide (use the preparation tips and script embedded in this workbook)
- One Change Over Time poster per Heart & Soul Statement (can be hand-drawn)
- Flipchart stand or tape to secure poster on a wall
- Extra note-taking materials for comments, quotes, action ideas
- Copies of Heart and Soul Statements
- Trend data relevant to Heart & Soul Statements
- Audio recording device (optional)

Preparation Tips

Location: Pick a neighborhood location where a group of people can sit together and easily hear each other. It can be the fire station meeting room, someone's living room, or even a local park.

Posters: Prepare posters, one for each Heart and Soul Statement. You can draw your Change Over Time posters or have them printed at a print shop.

Trends Information: Be sure to get local trends and data from the Heart & Soul Team. (For example, what's happening in the community's population? Are youth and young families coming or leaving? What's the average age of residents or number of youth? See page 8 for more information on local and national trends resources.)

Facilitation: If you've never walked a group through Change Over Time, review the Change Over Time video. Practice walking through the steps and get ready for an interesting conversation!

Demographic Slips: Demographic Slips will let you know who is at your event! Keep track and compare to your Community Network Analysis to ensure that you are involving everyone.

PLEASE CHECK THE BOX THAT APPLIES TO YOU FOR EACH OF THE DEMOGRAPHIC SECTIONS BELOW. THIS IS ANONYMOUS SO WE CAN BE SURE WE ARE HEARING FROM EVERYONE																												
Gender			Age								Race or Ethnicity						Length of Residency (Years)				Income (\$)				Part of Community You Live or Work			
M	F	Prefer not to reply	<5	5 to 19	20 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65+	Black or African American	Native American or Alaska Native	Asian	Native Hawaiian or Pacific Islander	White	Hispanic or Latina/o	More than one	<5	5 to 10	11 to 20	20+	Less than 25k	25k to 49,999	50k to 74,999	75k to 99,999	100k+		

7. ACTION

- expand community gardens in 5th ward
- education around food + how to prepare economics of eating healthy / local
- alternative access to affordable foods
 - neighborhood stores
 - food delivery → delivery service of non-parishable (Valesky's)
- Housing inspection program
- Subsidized home repair programs (HOME) for home owners
- teen center next to high school @ the MARC property
- enforced tenants' rights policies
- tenant/landlord support groups
 - mentorship
- tenant registry

Change Over Time is a Community Heart & Soul® tool that can help communities identify ideas for action from their own. It allows communities to visualize how values in the community have changed over time and how actions today can maintain or improve those values.

Community Heart & Soul®
Guided by Robert K. Rutterford

Heart & Soul Statement or Theme

HEALTH & SAFETY

1. How important is this statement or theme to our town?
① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩

2. Where does this value or theme show up in our community?
- Ind. local hospital
- Food Hub
- network of recycling
- WSI, Chaps, CPFS, Drug, Alcohol, Common Rooms
- Food pantries
- local restaurants, bakeries, cafes

3. How are things today?
- poor dental care?
- better communication between doctors
- sustain is complicated
- limited access to local food
- youth had access to local food home

4. How were things 20 years ago?
- long wait @ free clinic
- file if no DR's
- communication on free clinic - CTRM local policy
- food + support
- mental health + recovery
- Aik - more expensive stores in town
- National vs. Local
- healthcare + housing

5. If we do nothing differently, where are things headed?
Status Quo

6. How would we like things to be?
Desired

10	9	8	7	6	5	4	3	2	1
10	9	8	7	6	5	4	3	2	1

7. Capture ideas for action here

Change Over Time conversations in Meadville, PA yielded many community-generated action ideas for the theme of "Health and Safety"

Sample Agenda: Community Conversation with Change Over Time

Welcome (5-10 minutes)

- Greet participants
- Share refreshments
- Complete demographic slips

Introductions (10 minutes)

- Facilitate a fun (and quick!) introduction
- Recap your community's Heart & Soul process and the selected Heart & Soul Statement

Change Over Time (40-50 minutes)

- Explain the Change Over Time tool and walk through the steps
 - Spend about five minutes on each step. (Steps 2, 5, and 7 may take longer.)

Wrap-up and Review (5-10 minutes)

- Wrap up, recap, and say a big thank you! Be sure to talk about next steps.

Total time: About an hour

(If you opt to do a second Heart & Soul Statement or theme, add about 40-50 minutes to the total time.)

Change Over Time Facilitator Script

Here is a sample script for Change Over Time community facilitators. Use this to plan your Change Over Time community conversations!

Welcome and Introductions

- Welcome and thank you for coming!
- Facilitate an engaging introduction for participants
- Provide a brief overview of your community's Heart & Soul process and how the Heart & Soul Team will use the input from this meeting. *Make this fun! Show photos, talk about story gathering, provide some quick and interesting stats about the efforts you made to involve everyone.*
- Review the list of Heart & Soul Statements and identify the statement(s) to discuss
- Why are we here?
 - to dive deeper into our Heart & Soul Statements, and to think about our community's change over time—what do we want it to look like?
 - to develop a list of actions that will protect and enhance our community's Heart & Soul
- The Change Over Time tool helps us to:
 1. understand how Heart & Soul Statements show up in our community
 2. discuss what is positively or negatively affecting our community's Heart & Soul
 3. see that change happens, even if we do nothing differently. Heart & Soul Statements can help capture ideas for action to guide changes the community wants to see
- What comes next?
 - The Heart & Soul Team will host many community conversations and use other avenues to gather action ideas from the community. Heart & Soul Statements are always used as the frame for these conversations. Eventually, the community will prioritize these action ideas and develop a list that will guide future community initiatives and direction.

Change Over Time (see page 12 for the steps)

As the facilitator, make sure that you provide participants with time to talk through their thoughts before moving on to the next step. While the action item list is an important outcome of this exercise, the conversation and dialogue is equally important! You can refer to the Change Over Time video for facilitation tips and ideas.

Wrap Up and Review

- Congratulate participants on their work- good insight, great ideas!
- Quick review: in just a few words, what will you leave with after this exercise? What will you share with others?
- Mention how their input is so important for Phase 3 of Community Heart & Soul
- Ask participants to fill out demographic slips before they leave
- Thank you for your participation! Please tell your neighbors so that they, too, can be involved in a future Change Over Time activity in our community!

3. Thin Methods for Gathering Ideas

Idea Walls

Bucksport, Maine posted ideas for action in the windows of their downtown Heart & Soul headquarters. In addition to publicly posting all the ideas for action they had collected, the window display was easy advertising for their “clicker” activities where residents voted for their favorite ideas for action!

Community Booth

Gardiner, Maine collected ideas during their National Night Out. Participants could participate in a carnival-style game to get a slice of watermelon or a whoopie pie. Idea flags containing one wish or idea for Gardiner were created and displayed. The event was fun and family-friendly.

Text Polling

Laconia, New Hampshire used text polling to gather ideas. This method specifically targeted youth. Posters were put up at the schools. When participants completed the poll, they received a link to an optional longer survey.

Community Idea-Thon

Thomaston-Upson County, Georgia hosted a community idea-thon to bring the community together. It was organized as a drop-in event over the lunch hour, where residents were encouraged to add their ideas to colorful flipcharts. The first 25 participants won a free boxed lunch!

Social Media

Meadville, Pennsylvania used Facebook to celebrate their community participation during Phase 3. They published statistics, including the number of action ideas collected, the number of community members involved, and the number of community conversations.



IDEAS

Community Heart & Soul
Idea-A-Thon
WEDNESDAY, AUGUST 14TH
11AM-2PM DROP IN
UPSON EMC ANNEX
(FIRST 25 PEOPLE GET A BOXED LUNCH)

What idea gathering methods resonate with you? What do you think would be fun and effective in your community?

How do these methods employ the Heart & Soul Statements in the process of idea gathering?

Does looking at this list make you think of other ideas for gathering ideas for action? Be creative! Jot your ideas here:

Advertising the Idea-A-Thon in Thomaston-Upson, Georgia

Organizing Ideas for Action in the Project Spreadsheet

The Team will be drawing on or adding to the ideas for action that were gathered and entered in the Project Spreadsheet during Phase 2, and it is important to be able to follow your data to track where it came from.

Think about how you want to organize your ideas for action. You may want to code the action ideas to Heart & Soul Statement(s)—more than one, if an idea would work towards realizing multiple Heart & Soul Statements.

You may want to further subdivide by general ideas and specific actions. There is a difference between general ideas and possible specific actions. For example, “increase walkability” is not an action—it is an idea. An action might be to “shift more resources to trails and parks,” “repair sidewalks on X street,” or “install a cross-walk at Y intersection.”

Just as in Phase 2, it is important to track demographics when gathering ideas for action. Each time you have an event, you should capture demographics using the same categories that you used during story gathering. That way, you are able to compare your participation with the Community Network Analysis to ensure that you are hearing from as many demographics as possible.

In addition, keep track of the new faces and interested community members you see at Phase 3 activities. Phase 3 is an exciting time, as it can attract the doers in your community, those people who are ready to pick up a shovel, or draft up a plan, and implement!

Community members who attend idea gathering events or activities may be interested in being part of Heart & Soul stewardship, a partner in implementation of the action plan, or a local expert with knowledge about specific topics related to action ideas.

Ideas for Action			
<p><i>Instructions: This is a place to record and organize all the ideas for action you collect from community members throughout the Heart & Soul effort. You may start populating this worksheet with ideas you heard during your Story Gathering activities during Phase 2. Other action ideas will come from events and activities you specifically design for collecting action ideas in Phase 3.</i></p>			
Event	Date	Idea	Related Heart & Soul Statement <i>(You can create a drop-down menu for this column)</i>

How do you know when you have collected enough action ideas?

- There is a healthy mixture of general ideas and specific actions related to each Heart & Soul Statement/theme.
- You hear many of the same action ideas being repeated.
- You’ve heard from a representative cross-section of the community.



Prioritizing Ideas for Action

Prioritize Ideas the Heart & Soul Way

Involve Everyone ◇ Focus on What Matters ◇ Play the Long Game

Choose Your Method

- Impact-Feasibility Rating
- Ranked Choice Voting

Choose Your Technology and Supplies

- Simple, tactile, manual-based
- Electronic, device, app-based

Choose Your Approach to Community Engagement

- Series of small, focused Community Events
- Major Community Event/"Idea Summit"
- Combination

Prepare to Prioritize: Sort, Group, Filter, Combine, and Clarify

Every idea for action must be heard and documented. But we know that every idea for action may not be feasible. As your Heart & Soul Team prepares to present all the data to the community, it is wise to do some sorting, filtering, combining, and clarifying in advance so it can be presented in an organized fashion. This will help make analysis and prioritization with the community go more smoothly.

Tips

Sort the action ideas by **grouping** them under your Heart & Soul Statements. You may want to have additional tabs in the Project Spreadsheet for each Heart & Soul Statement and the related ideas for action.

Next, **filter** ideas by separating those that are not at all feasible. But don't throw them away! Some may be out of reach, but there could be variations of an idea that are more feasible (if not now, then in the future).

Combine very similar ideas into one action idea. You might expand an overarching idea to include several related or sub-ideas. Doing so might position the collection of ideas to be considered as a long-term strategy or make it more feasible to apply for grants and other funding sources.

Clarify: Some ideas may need more clarity around what is needed to make them happen. Example: It is easy to support a general idea such as cleaning up the town, but the actual option for a town plan might be to recommend the use of town funds to support or staff a clean-up program.

Lastly, in terms of preparation for taking action ideas to the community, what trend data would be good to have on hand? If trend data was already compiled during the action idea gathering stage, then it can be useful to bring it to prioritizing events for reference. If not previously compiled, is now a good time to do this? (See page 8 for more information on local and national trends.)

1. Choose Your Method

Two different **methods** can help communities prioritize their ideas for action: Impact-Feasibility Rating or Ranked Choice Voting.

Using the **Impact-Feasibility Matrix** tool, community members consider the merits of each action idea individually without reference to other action ideas.

With **Ranked Choice Voting**, people select their top preferences in relation to other action ideas. Whichever method you choose, be consistent with using it across various types of community events so that community input can be aggregated and there is shared understanding about how action ideas were prioritized in the community.

Method #1: Impact-Feasibility Rating

The Impact-Feasibility Rating is a method for evaluating and prioritizing action ideas. It gets participants discussing the scope and depth of positive impact a given action idea might have on the community. Participants also consider the effort, resources, and cost involved in making the idea happen.

Impact: Is the action predicted to have a high, medium, or low impact on the community? What are the benefits of the idea? How will quality of life change? For whom and for how many?

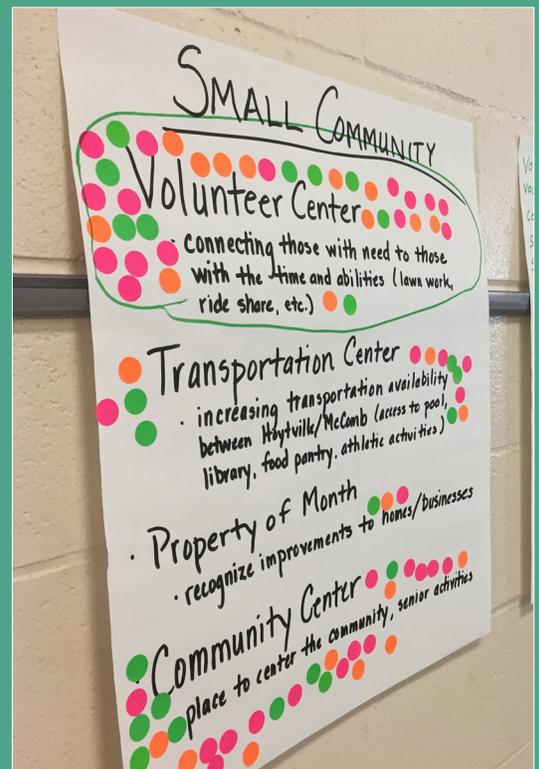
Feasibility: Is the idea something that can be accomplished in a short amount of time and with modest resources and readily available funding (such as planning a community green-up day, painting a mural, installing park benches)? Or will it involve a multi-year effort involving many partners and funders (such as building an outdoor community theater, renovating a bridge, or removing a dilapidated structure)?

After discussion, community members give the action idea a high, medium, or low score for each of the measures. For example, one idea might rate favorably high for impact and low on feasibility while another idea is highly feasible yet anticipated to have a moderate impact. As each idea is discussed, its combined impact-feasibility rating is recorded (e.g., high-high; low-medium; high-low, etc.).

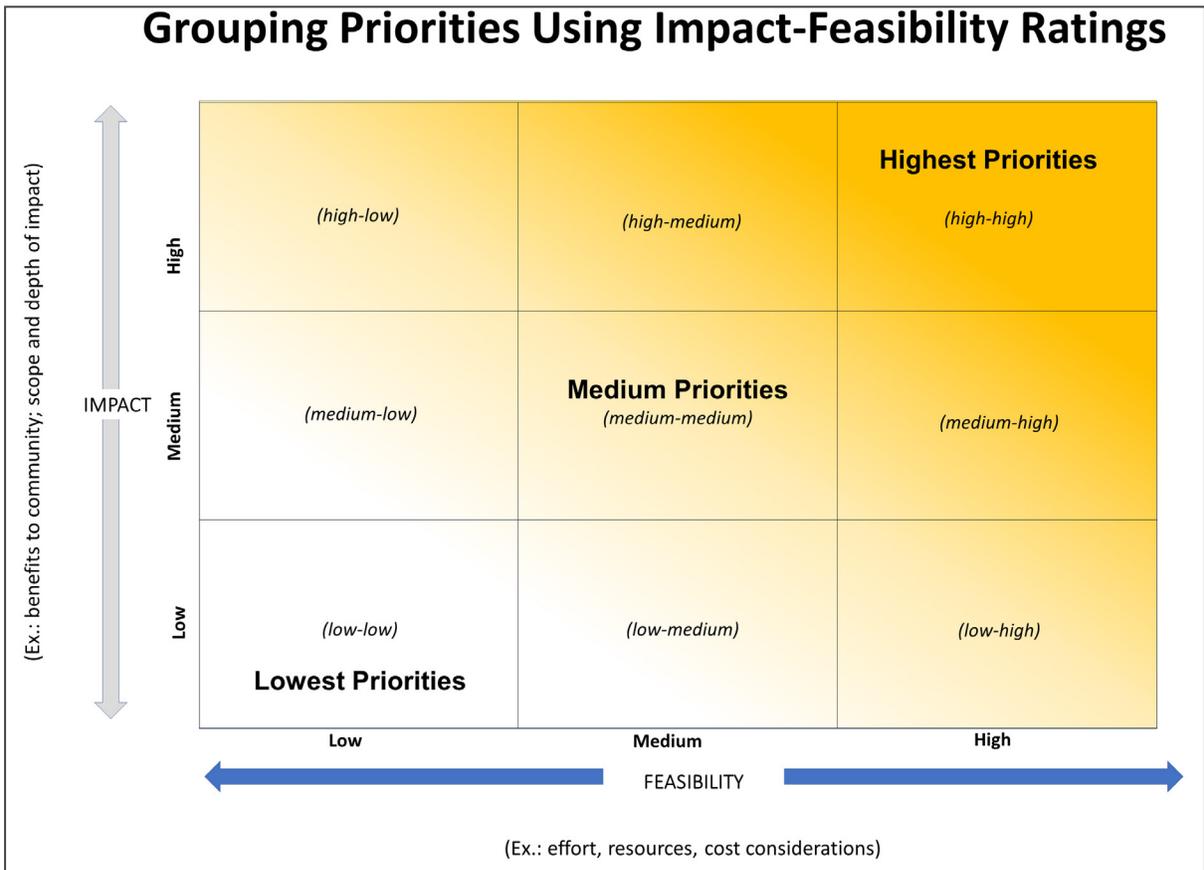
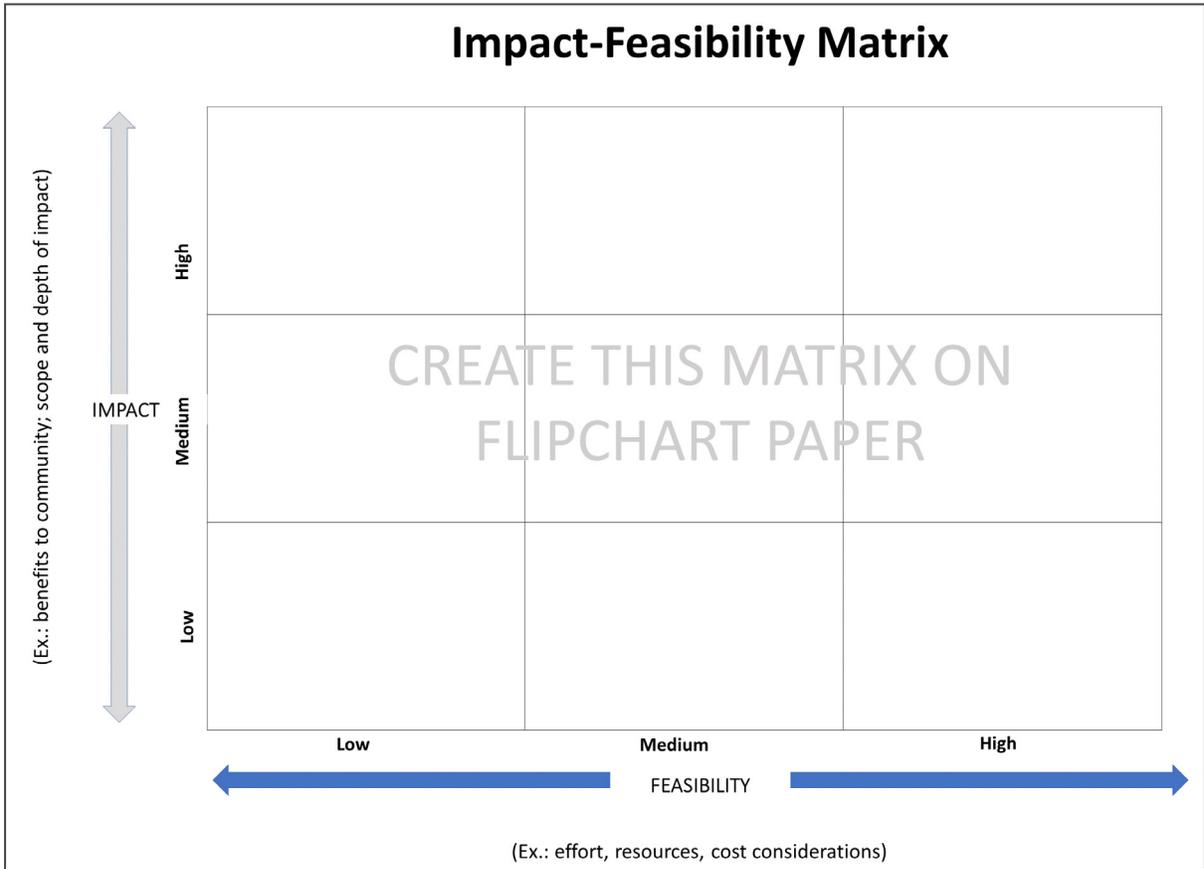
After all the action ideas have been evaluated and rated, they are grouped and prioritized by their combined impact-feasibility rating. For example, action ideas that rate high on both measures may be categorized as a high priority because they have the greatest chance of being accomplished and are viewed as having the potential for the greatest (and possibly immediate) positive impact on the community. Ideas that rate lower may be deemed a lower priority. This, however, doesn't necessarily mean that an idea won't come to fruition; it just might take longer to accomplish or require more championing. The highest priority items are the ones most likely to get the attention, support, and resources needed.



A community event using the impact-feasibility matrix in Meadville, Pennsylvania



Ranked choice voting in McComb, Ohio



Steps

1. Pre-sort your action ideas into Heart & Soul Themes and have them printed out.
2. Have an Impact-Feasibility Matrix ready. You might use a series of hand-drawn posters each with one Heart & Soul Statement at the top. Or you might use one poster to evaluate all the ideas under consideration.
3. Take each action idea one at a time.
4. Read the action idea aloud.
5. As a group, discuss different aspects of the idea's potential impact on the community and its feasibility. First, what are the benefits of the idea and who will be affected? What evidence points to scope and depth of impact? Next, what effort, resources, and cost considerations are likely involved? How feasible is the idea? Are there people in the room who would have special insight into this? If not, who in the community would?
6. Decide as a group where the action idea belongs on the Impact-Feasibility Matrix. Once there is consensus, place the strip of paper with the idea on the appropriate square in the matrix (there are 9). You might also gather this input using polling devices or apps and ask them to rate each twice—high, low, medium for impact and high, low, medium for feasibility.
Example: An idea that is deemed “high” impact and “high” feasibility would be placed in the top right-hand corner.
7. When all the action ideas have been placed on the matrix, reflect as a group which actions should be of higher priority for the community. What is in each of the squares of the matrix? How many are in or around the high/high square? Medium? Low/low?

Tips

When bringing this activity to the community, the Heart & Soul Team is encouraged to pre-group the action ideas by Heart & Soul Statements/themes so there is a clear indication for how the idea relates to what matters most to residents. At the very least, each idea should be “tagged” with the Heart & Soul Statement(s) it advances.

It is also helpful to provide some context for each idea, if possible: How did this idea come about? What are some facts and considerations related to the action idea? Any community conditions or local/national trends to note? What hopes and concerns does it address?

As each idea is being discussed, the team might prompt participants to consider “Who are the players that could/should be involved in making this idea a reality?” Some may even be in the room. Make note of the people or organizations identified for likely being able to champion/support an idea. You will want to connect with them during the action planning stage.

Whether doing this activity in small or large groups, in-person, or virtual, use the supplies and technology that will help you keep track of the results.



*Charting the results of prioritized action ideas during a “Community Idea Summit,”
Mahoosucs, Maine*

Method #2: Ranked Choice Voting

With this method, community members vote for their top preferences amongst action ideas grouped within a given Heart & Soul Statement or theme. Voting can occur in a variety of creative ways (see options below). Action items are then ordered (ranked) to prioritize ideas from highest to lowest. Those receiving the most votes, dots, dollars, etc. appear at the top of the list while those receiving the least appear towards the bottom. *(Note: When we use the term “ranked choice voting,” we do not mean using the formal, more complicated formula involved in run-off voting employed for political campaigns. To eliminate any confusion, you may want to only refer to your method by the name of the chosen activity used to prioritize action ideas (e.g. dot voting, spending priority, etc.).*

Steps

1. Begin by grouping ideas by their Heart & Soul Statement. Prepare a flipchart page, handout, or other visual that includes the Heart & Soul Statement along with the action ideas.
2. Provide criteria for consideration (discussion points) such as the following:
 - Context/rationale for the action idea (e.g., trends, community conditions, hopes, or concerns related to the idea)
 - Benefits and beneficiaries of the idea; projected impact
 - Projected cost/resources needed (Is the value worth the cost?)
 - Projected time to complete
 - Urgency
 - Sponsorship: Does the action idea have a champion who is ready to make it happen? Or is it such a great idea that a champion or funding is guaranteed to materialize?
3. Review the ideas and discuss the merits of each in small groups or with the whole group before giving instructions for one of the below voting options and setting people loose to vote.

Options

Stones in jars: Have a jar for each action idea set up on tables. Paint or wrap the jars so people can't see inside. Label each jar with an action idea. Each participant is provided an equal amount of stones or candy or whatever object you are using. Then participants have the opportunity to add their stones to the jars. They might put all their stones in one jar for one idea or distribute them among multiple jars/ideas. This is a form of “blind” voting where participants are not meant to see or be influenced by other participants' choices.

Sticky Dots and Poster Boards: Set up a poster board or flipchart page with a Heart & Soul Statement at the top. List the suggested action items below the statement, leaving space beside each for sticky dots. Community members vote by placing sticky dots next to their preferred ideas for action. In this “open voting” method, participants see other votes. If you are working on multiple Heart & Soul Statements during your event, set up a series of poster boards each with a different Heart & Soul Statement and their accompanying action ideas.

The **Spending Priority Game** is a way to reveal or represent people's priorities by what they are willing to spend money on. It gets people talking about the distribution of scarce resources. Since, we usually can't do all projects all at once, what do we prioritize? Every participant receives a set amount of “play money” or tokens which they can distribute amongst the action ideas they would most like to see happen. They might put all their money on one idea or distribute it among 5, 10, or 20 ideas. After everyone has distributed their money, the team “counts up” the dollars or tokens for each action idea. The ideas can then be ranked by how much money/support each received.



Thomaston-Upson's community chalkboard encourages residents to vote on ideas in Thomaston, Georgia

3. Choose Your Approach to Community Engagement

There are a number of ways the team might engage the community in prioritizing action ideas. You could host a **series of smaller, focused Community Events**, host a **Major Community Event (what some communities call an “Idea Summit”)**, or do a **combination** of these depending on what you think will provide the greatest opportunities for people to participate and provide input as well as continue spreading the word about Heart & Soul.

The preference is for prioritization activities to happen face-to-face with neighbors, whether that is in-person or virtually. You may even want to provide opportunities for both to increase access. The approaches just named might also be supplemented with opportunities for providing input through mail-in, hand-in, or online methods.

Hosting a **series of smaller community events** involves setting up re-occurring opportunities for smaller, intentional groups to participate in prioritization. Each event might focus on a different Heart & Soul Statement/ theme or occur in a different setting/part of the neighborhood or involve a particular group.

With a **major community event**, the idea is to bring a large cross-section of the community together at one time.

Perhaps it makes sense to do a **combination** of smaller events and one major event to reach as many people as possible. Or perhaps there are good reasons for hosting a major event and then following up in another way with those who weren't able to attend in order to capture their thoughts.

Since hosting a major event involves a fair amount of planning and volunteer coordination, let's take a look at how an “Idea Summit” would work.

The Community Prioritizing Summit

It is time to prioritize your community's action ideas, and your Heart & Soul Team has decided to host a Community Summit. Where do you start? This guide walks through everything that your Heart & Soul Team needs to know to plan this big community event!

Preparation Tips for the Community Prioritizing Summit

- You will need to have your action ideas sorted, grouped, filtered, combined, and clarified in order to consistently prioritize across your community.
- Determine how the Summit will be paired with other prioritizing events/opportunities (online surveys, smaller events, etc.) to hear from your community.
- Choose a venue that makes sense for your community. Is it a welcoming place for all? Does it have everything you need to host your Summit?
- Plan for participation: Can you have childcare available on-site? Can you provide transportation to and from the summit? Have you scheduled your summit for a time that works for most community members?
- Use the skills that you honed during Phase 2 (story gathering, listening, and sharing strategies and events) to plan for your Community Summit!

Greet your Community

Have multiple greeters at the door. They can welcome people as they arrive, share relevant materials, and encourage participants to sign in. Greeters can also encourage participants to complete the Demographics at the Door activity and let them know where they should go in the room.

- **Demographics at the Door:** Set up posters like you have at previous activities. Include a sign-up sheet to track the number of participants.



Demographics at the Door in Meadville, Pennsylvania

Mingle and Settle-in

Create opportunities for people to get oriented and socialize with drinks and light snacks; you can place a meal at the beginning of the event, but it can be a great enticement to stay for the entire meeting if you feed people later!

The following are some suggestions for room setup that the Heart & Soul Team can use to make the summit entertaining to guests before the event begins.

- Watch or listen to stories - Set up a projector to share videos of the stories that were gathered in Phase 2. Share visual art that was gathered as stories.
- Display Heart & Soul Statements - Make sure your Heart & Soul Statements are visible to all! In addition to having these available at each table or making copies for participants to take home, hang them on the wall for everyone to see. You can also display your Community Network Analysis or any additional infographics that you have on participation during your Heart & Soul efforts.
- Network - Invite local groups to have an information table at your event to share their stories and work with participants.
- Entertain - A school band or performing arts group could be there to demonstrate local community pride and to officially welcome participants to the event.

Welcome, Agenda, and Introductions

- Ask a community leader to introduce the event and share the agenda. You will have people who are new to Heart & Soul, as well as long-time contributors. Share the story of your community's Heart & Soul journey. Some communities have used short videos to capture this information. Others have featured slideshows that highlight events and happenings. Here is an example: Golden, Colorado's Vision 2030 video.
- Consider providing opportunities for the people in the room to introduce themselves to the larger group, their table/small group, or even just to the people next to them. You can ask them to share what they're most passionate about, what's the best thing that happened to them today, or what are they most excited about right now.
- Share the results of the Demographics at the Door activity so people know who is in the room. You can also note who is not in the room, and let the audience know your plan for follow-up with these groups in your community. If you're using keypad or text polling, you can poll participants for demographic information later in the event and share out results instantly.

Decision Making with Community Heart & Soul

- Have a Heart & Soul team member talk about the significance of making decisions using Community Heart & Soul. Heart & Soul Statements represent what matters most to your community, and they are a structured framework through which to make decisions. The Heart & Soul Statements will help organizations and groups in the community come together where they see overlap in their work. They can also inform community planning, guide program and project development, policy making, investments and budget processes, as well as operational procedures. Consequences and desired outcomes will be more consistent with what matters to your community.
- Next, introduce each Heart & Soul Statement (and, in some cases, overarching theme) and explain how the related action ideas were collected from Phase 2 story gathering and Phase 3 action idea conversations (both thick community conversations and thin methods). Make the connection between action idea suggestions and Heart & Soul Statements. You may want to draw on previous Change Over Time discussions to highlight the connection between action ideas and Heart & Soul Statements.



Mount Blanchard, Ohio Heart & Soul event

Discussions and Prioritization

Note: Community members may be divided into small groups, each focusing on one Heart & Soul Statement/theme and the associated action ideas. Alternatively, all participants may be prioritizing the ideas individually, while utilizing keypads for voting or by rotating around stations. Your setup will determine the format of the discussion and prioritization.

- Give participants time to review the Heart & Soul Statement/overarching theme and the action ideas identified from Phase 2 story gathering and Phase 3 action idea conversations. Remind participants that they are prioritizing action ideas that have already been **sorted, grouped, filtered, combined, and clarified**.
- Provide time for conversations about the collection of action ideas and the related Heart & Soul Statement/overarching theme prior to prioritizing.
- Depending on the **prioritizing tool** (Impact-Feasibility or Ranked Choice Voting) and the **technology** that your team has chosen (keypads, text polling, flipchart, sticky dots, etc.), proceed with the prioritization. Again, this may be happening at tables, stations, or individually.
- Create a final tally for each table and save the numbers for a final compilation.

If you are using tables or small groups that focus on a Heart & Soul Statement/theme:

Have table members move to a new table (they can all move to different tables or move as a group) and recreate the process with a new Heart & Soul Statement/overarching theme. Complete as many “rounds” as possible. Ideally, each participant will have the opportunity to converse with others and vote at each table.

If you are using stations and individual prioritizing:

Ensure that people are moving around to each prioritization station. To ensure that each participant visits every station, you could provide participants with a “Heart & Soul Statement Passport” that is marked for each visit to a station.

Eat Together

- Grab some food to keep going for the rest of the meeting. The meal could be catered or maybe it’s a community potluck—just make sure you have enough!
- Organizers can use this break time to log the tallies from each table/station. You will either need to copy them onto paper or a white board or input them into your keypad polling presentation.

Culminating Discussion and Next Steps

- Unveil the numbers: what action ideas rose to the top at the Summit?
- If possible, facilitate a group discussion about the process: why did particular action ideas score high or low; what was surprising; what is exciting for the future.
- Capture any questions the group may have and if there is time, answer them before the event concludes. Place questions that did not get addressed in the “parking lot” and use email addresses on the sign-in sheet to follow up.
- Ask a question to the large group: Who did we miss today? Who do we need as champions for our actions? Each action will need a champion, like the YMCA, the public library, the Parent-Teacher Organization, or even non-formal groups like the town’s youth, and it is critical that you touch base with the people who were not able to attend. There is more information on this aspect of action planning in the Focused-In Training, *Strategizing for Action Planning*.
- Conclude by share the Heart & Soul Team’s next steps, including a short description of what will happen in Phase 4 (Stewardship Team development and implementation of actions). Invite people to join!
- Let participants know that the prioritized action items will also be taken to the broader community for more verification and input. Lay out the timeline for upcoming events so people know how to stay involved.
- Share the results of the event and the actions broadly using outreach channels and tools that worked in Phase 2.
- Celebrate the completion of another successful community-wide event!



After Your Prioritization Activities

Whether you choose to host a series of small community events, a major event, or a combination of these for prioritization, at the end of the process you will have a list of prioritized action ideas. This is what guides your future work. It forms the substance of the action plan and feeds into implementation in Phase 4.

How long should your list of prioritized actions be? It depends on how your team decides to sort, filter, and prioritize. One community culled down to 20 action ideas (but kept all of their ideas for future use) while another community had 82.

How should you organize your list? One approach is to first organize ideas by their Heart & Soul Statement/ theme. Then under each theme, order the ideas using the results of the Impact-Feasibility or Ranked Choice Voting activities. Others may choose to present all the ideas, regardless of theme, in the order of greatest priority (with references to the theme next to each idea).

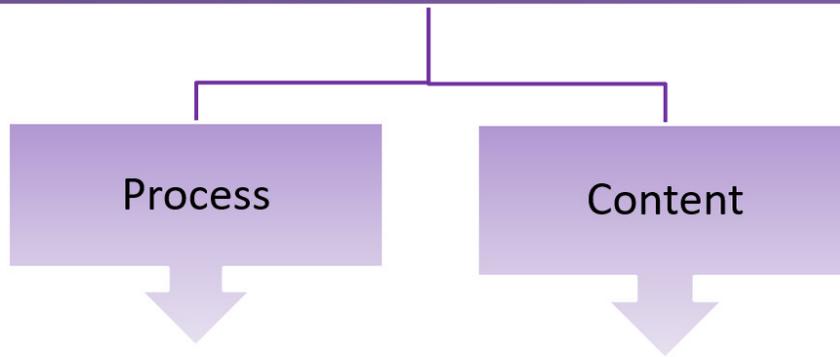
A further way of organizing ideas for action may be around a targeted completion date. What ideas for action could be accomplished in less than a year? Less than three years? Five or longer?



Turning Ideas Into a Plan for Action

Action Planning the Heart & Soul Way

Involve Everyone ◊ Focus on What Matters ◊ Play the Long Game



- Ensure community input
- Gain support for action items from key groups and organizations
- Vet the final language
- Widely share

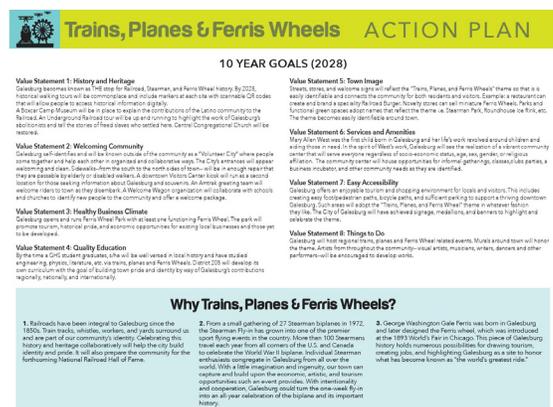
- History of your project
- Methods used to "involve everyone"
- Heart & Soul Statements
- Action items and implementation plans

Turning Ideas into a Plan for Action

After your community has come together and you have a comprehensive list of prioritized action idea, all organized within the framework of your Heart & Soul Statements, what's next? You work on an action plan created by and for the community.

The latter part of Phase 3 and all of Phase 4 are where you demonstrate how collective decision-making and community participation gets carried through in action planning. It is critical to use this time to gain community support for action ideas and an ongoing commitment to Heart & Soul. You do this by creating an atmosphere of inclusion and respect for other organizations.

The Heart & Soul Action Plan becomes a community's road map for how it will "make good" on what they say matters most. It features the community's Heart & Soul Statements and the concrete actions and projects to support those themes. It identifies who is involved and the projected timeline of each project. And it invites even more people to the table to bring the ideas to fruition.



Action Planning Strategy Worksheet

HEART & SOUL STATEMENT <i>(include action ideas, if gathered)</i>	KEY PEOPLE & ORGANIZATIONS TO INVOLVE	CONTACT INFO	STRATEGY	TEAM MEMBER; DATE	NOTES/FOLLOW UP
<p>Education: We value a quality local education system that challenges students in a safe learning environment so that all students are capable of building a better future.</p>	Parent Teacher Organization		Ask to present at next meeting	Susan; 6.15.18	Will present in September. They don't meet over the summer. Jody will call back with date.
	School Board		Ask to present at next meeting	Susan; 6.15.18	Will talk with board on July 16, 7 PM
	School Transportation Department		Schedule a meeting	Jan	Will go in and have joint meeting with Transportation and School Admin at beginning of school year
	Superintendent		Schedule a meeting	Delilah	See Jan's note above; she will talk with Superintendent.
	Youth leaders in school (National Honor Society, Key Club, Future Farmers of America, Student Council, etc.)		Figure out a way to meet with all at one time (if possible)	Jessica	Will wait until school starts and new leaders/ members are elected and appointed
	Booster Club		Ask to present at next meeting	John	Talked with Russ Samuelson; they want to see list of education action ideas at Sept meeting.

Here are some tips for planning what you will say to community members and organizations when you meet with them:

- Find ways to make the connection. Send the right messenger to the right groups.
- Budget the time you need to have thoughtful, meaningful, and individualized conversations.
- Provide access to information in advance. Make it clear and easily available online or in print. *(If your team established a Heart & Soul website to track their efforts, that's usually a great place to post things and send people to for information.)*
- Depending on when you contact people, you will want to let them know about what is going on in the Heart & Soul effort as well as any upcoming opportunities for:
 - Submitting ideas
 - Participating in planned events for providing input or prioritizing action ideas
 - Hearing what's ahead for the action plan and their role in it.
- Bring along the Heart & Soul Statements and relevant action ideas. Point out how each action idea or policy suggestion supports what matters most.
- Explain how many people were involved in the process to develop the action ideas.
- Ask them to pick and commit to action ideas that align with their mission.
- Invite them to weigh in on any factors that may not have been considered during prioritization (or invite them to be part of prioritization activities, if those are coming up).
- Clarify how their feedback will be used and intentions for their role in the action plan.

Keep the communication going. One meeting is a great way to start, but you will need to ensure that people are kept in the loop. Add them to your mailing list. Send out reminder emails for meetings and events. Make sure that they feel included and that their participation is appreciated.

2. Content of a Heart & Soul Action Plan

The template on the next two pages includes suggested components for a community-driven Heart & Soul Action Plan as well as a structure for organizing and presenting your action ideas and plans for implementation.

Check out these sample Action Plans from Heart & Soul communities:

- [Trains, Planes, and Ferris Wheels](#), Galesburg, Illinois Action Plan
- [My Meadville Community Action Plan](#), Meadville, Pennsylvania

MY MEADVILLE

COMMUNITY ACTION PLAN



ACTION PLAN

Your Heart & Soul Logo

Template

<Town> Heart & Soul

Title: Give your document a title that reflects its purpose and your community identity. (Examples: “My Meadville Community Action Plan,” “Golden Vision 2030,” “Trains, Planes, and Ferris Wheels: Galesburg, Illinois Action Plan”)

Purpose of the Document: Describe what an action plan is and what it seeks to achieve. Include a summary statement of what is represented in the document and the overarching goals of the action plan. You may even want to include a table of contents to show how information is organized.

Background: Insert information about your Heart & Soul project. Identify the purpose of the project, how it began, partnering organizations and collaborators, and a timeline of milestones.

Process/Methods: Summarize the process your Heart & Soul Team used to develop the action plan. What brought you to this point? What happened during the phases of your Heart & Soul process? Demonstrate the scope of community engagement by listing the number of individuals involved, workshops held, meetings attended, community events hosted, stories listened to, data points collected, and any other examples of community input. Also: How did you collect ideas for action? How was the community involved in prioritizing those ideas? Who was heard from at your events? What demographics are reflected in your engagement efforts and collected data?

Heart & Soul Statements: List and describe the Heart & Soul Statements your community developed. Note if they were adopted by your Town/City Council or other groups and organizations. Are they being used as a framework for any other community planning documents?

Action Items and Plans for Implementation: This is the core of your action plan! Outline the action items decided upon by the community and describe what steps will be taken to carry out the actions. Many choose to group action steps under their corresponding Heart & Soul Statement or theme. Include: Lead solution partner; supporting partners, organizations, or individuals; cost/funding sources; timeframe or target date for completion; milestones for completing the action. (See next page for example.)

Evaluation and Monitoring Progress for the Long-Term: Introduce your Stewardship Team here. Explain what their role is in the Heart & Soul process; specifically, what will the Stewardship Team do to ensure that action items are completed? Name the organizations and entities that will support the ongoing effort. How will progress be evaluated and later shared with the community? How frequently? It is important to provide as many details as possible here as this will help create trust in the community through transparency. State how community members can stay involved or contribute to implementation efforts.

Tips: Include your Heart & Soul logo. Use photos and graphics throughout your action plan to document and organize your information. They add life to the story of your Heart & Soul process! Some communities also choose to highlight early successes or action ideas that have already been implemented.

Organizing and Presenting your Action Items and Plans for Implementation

When building out the details of the action ideas your community plans to pursue, here is one possible way to structure the information for inclusion in your Action Plan.

Heart & Soul Statement

We take pride in being a community that is walkable, bikeable, and accessible to all.

Goal

We will provide safe, convenient, and well-maintained biking and walking opportunities appropriate for all ages and abilities.

Action	Lead Solution Partner(s)	Supporting Partner(s)	Existing Resources	Cost & Funding Sources	Timeframe (years)				Milestones
					0 < 1	1 < 2	2 < 5	5+	
Conduct a walkability-bikeability audit for age access, safety, and amenities	City, high school, senior center	Rotary, Walkability Institute	GIS map of sidewalks	ioby.com	✓				Input gathered from children, parents, and seniors Audit results shared
Action	Lead Solution Partner(s)	Supporting Partner(s)	Existing Resources	Cost & Funding Sources	Timeframe (years)				Milestones
					0 < 1	1 < 2	2 < 5	5+	
Build and fill in missing parts of sidewalks around the community	City, grant writer	School, senior center	Walking routes mapped, missing sidewalk sections identified	\$200,000 Crowdfsource grant, safe routes to school		✓			
Action	Lead Solution Partner(s)	Supporting Partner(s)	Existing Resources	Cost & Funding Sources	Timeframe (years)				Milestones
					0 < 1	1 < 2	2 < 5	5+	
?									



Preparing to Steward Heart & Soul

Phase 3 Reflection Guide

Why is it important to reflect and celebrate in each phase? So many reasons!

- Remind your Heart & Soul Team of its progress and accomplishments.
- Determine your readiness to begin the next phase.
- Identify any gaps in the work that needs attention as the next phase begins (see Milestones).
- Honor the contributions made by volunteers and supporters.
- Pull together key information for reporting to funders and sharing with the community.
- Keep your town on track towards its goals. Keep the momentum going!

Timing: You can use these questions at any point in this Phase to plan ahead or to check on your progress with Milestones; however, it is especially important to do this reflection as you prepare to move into Phase 4.

Instructions:

	<p>Set aside dedicated time to discuss the reflection questions with your Core Team. Questions are informed by the three Heart & Soul Principles and Phase 3 Milestones.</p>
	<p>In advance:</p> <p>Assemble basic information about this phase (Milestones and your achievements) to share and have on hand during the conversation.</p> <p>Consider what role your Heart & Soul Coach will play in this exercise. What is the team needing right now? Would it be helpful to invite your Coach to co-plan or co-facilitate this reflection to bring an objective eye to the conversation? Do you want your Coach to simply be present and offer feedback? If not present, how will you share key take-aways?</p>
	<p>Have a team member take notes (or record responses on flip charts). Be sure to save/store the notes and share them with team members who were present as well as those who may not have been able to attend.</p>

Reflection Questions:

Focus on What Matters	<p>In what ways have our Heart & Soul Statements been shared and used during Phase 3?</p> <p>How have our Heart & Soul Statements along with local and national trends informed the proposed action ideas we've collected?</p>
Involve Everyone	<p>How did we use the Community Network Analysis to widely share our finalized Heart & Soul Statements? With whom and what groups?</p> <p>What community groups from our Community Network Analysis did we involve for input about action ideas to prioritize? Where have we held events to ensure we are reaching the geographic scope of our community? What groups were missing? Who do we still need to reach?</p> <p>What did we learn from reviewing, refining, and prioritizing action ideas with the community?</p>
Play the Long Game	<p>Which key groups and organizations have pledged support for which action ideas? Which action ideas still need supporters and sponsors? How will we achieve this?</p> <p>Who has contributed to the draft Community Action Plan so far? Who else needs to be consulted and what work still needs to be completed?</p> <p>How are we engaging local leaders, planners, and town government to link Heart & Soul to community initiatives--especially municipal and/or county planning processes--that are either coming up or underway? What have been the outcomes so far?</p> <p>Who should we be talking to about joining our Stewardship Team? Who in our community has been active in Phase 3 and might want to be involved in ensuring action ideas get implemented?</p>

Phase 3 Milestones: What Milestones have we completed? (See pg. 5.) What is our plan to address any tasks that still need to get done?

Wrap up: Overall, what have we learned during this phase that has been most helpful? How might we apply what we have learned going forward? Based on today's conversation, what support, feedback, or guidance would be helpful to request from our Heart & Soul Coach?

Celebrate Together

What has been noteworthy or promising about our efforts and progress in this phase? How and when will we share with the larger community what's been accomplished so far and where we're headed next?

By the numbers!

- _____ # of volunteers who participated in Phase 3
- _____ # of groups/organizations/individuals with whom we've shared our Heart & Soul Statements
- _____ # of action ideas generated by the community
- _____ # of community members participating in prioritizing action ideas
- _____ # of partners/organizations contributing to community action plan

Additional Achievements

Ex. Are more residents participating in town council meetings and civic engagement?



What would be a good way for our team to take a breather and come together in a relaxing and fun way—perhaps a celebratory meal, a pizza party, a hike, or a bowling night? **Set a date and enjoy yourselves!**

— Community —
Heart & Soul[®]

www.communityheartandsoul.org

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