PHASE 1

Volunteer Workbook

2020

Community Heart & Soul®

Guided by what matters most

Table of Contents

*These documents have been adapted for this Volunteer Workbook. The original Microsoft Word versions are available from your Heart & Soul Coach for your team's use.

Dear **Community Heart & Soul** Participant,

Welcome to the Community Heart & Soul® Training Workshops! Through your interest in Community Heart & Soul, you are helping to make our mission possible: to empower people to shape the future of their communities by **improving** local decision-making, **creating** a shared sense of belonging, and ultimately **strengthening** the social, cultural, and economic vibrancy of each place.

In our twenty years of working in rural community development, we've learned that **the strength of a community lies in the hands and the hearts of the people who live there.** The Heart & Soul model focuses on deep resident engagement, discovering and embracing emotional connections within the community, and creating a foundation of hope that leads to new energy and excitement for action in small cities and towns. Heart & Soul encourages communities to try new approaches to engagement and decision-making, while learning about themselves along the way. **You will no doubt be witness to positive transformations at both individual and community levels.**

Again, we would like to thank you for your interest in Community Heart & Soul. We are all working together to ensure that communities receive the best quality training to further their Heart & Soul.

With gratitude,

Sara Lightner
Director of Training
Community Heart & Soul

Phase 1 Lay the Groundwork

PHASE 1 LEARNING OBJECTIVES

- Create the first draft of a Community Network Analysis that represents your community

- Describe how to put together a demographically representative Heart & Soul Team that utilizes members' skills

- Develop messaging to build awareness and support for your community's Heart & Soul process

hello.
let's get started!

PHASE 1 MILESTONES

- Heart & Soul Team assembles

- Pool of volunteers assembled for initial Heart & Soul activities

- Local officials/town government linked into Heart & Soul Team activities

- Sub-teams created for specific tasks/jobs

- Project Coordination plan created

- Work Plan started

- Overarching Heart & Soul Goals and Geographic Area written

- Phase 1 Objectives and Tasks mapped out

- Phase 1 budget and a general outline of budget for remaining phases created

- Public awareness activities started

- Development of core messaging and marketing tools underway

- Heart & Soul launched publicly

- Reflect and Celebrate!

THE WHEEL
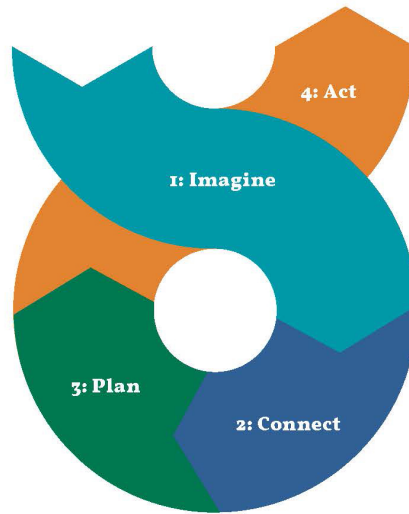
PHASE 1 FOCUSED-IN TRAININGS

1. Building the Heart & Soul Team

2. Developing Your Work Planning System

3. Creating Your Communications Strategy

4. Hiring and Onboarding Your Project Coordinator

OVERARCHING GOALS
Examples from Heart & Soul Communities

Bucksport, Maine

1. Build a foundation for our future that welcomes and includes our differences

2. Embrace our shared values so everyone benefits and is healthy and thrives

3. Create a strong compassionate community that appreciates diversity

4. Listen to the voices of all community members and welcome their involvement

5. Create a community that is economically self-sustaining and prosperous

6. Create a community where everyone wants to be involved

7. Build a launching pad for a successful future where Bucksport is thriving economically

Canaan, Vermont

1. Through collaboration revitalize and build the Canaan community based on local values by connecting to and including voices of all members of the community

2. Enhance and expand bridges connecting Canaan and its neighbors in surrounding communities in Vermont, New Hampshire, and Quebec to create a healthy, active destination for community and commerce

3. Decide what happens next to create the future of the Canaan region

Essex, Vermont

1. Participatory approach to community planning that engages residents in a respectful, conversational process

2. Build skills for constructive communication and foster understanding of and respect for diverse opinions and perspectives

3. Increased voter turnout and active participation and attendance at public meetings

4. A renewed involvement in community and civic activity noted by an increase in candidates who run for local public office

5. A coordinated planning process for both communities (Essex and Essex Junction)

Grand Lake, Colorado

1. Build a community where everyone feels safe, respected, and valued

2. Put the "We" into "Welcome"

3. Preserve and protect our extraordinary natural resources

4. Diversify to bring year-round jobs and economic resilience

5. Honor our rich heritage

1. **The Vision and Future Land Use chapters of Laconia's Master Plan.** The community vision will represent the shared interests of community members expressed as community values – those things that make our community unique and that we consider to be most important to us. The Vision will direct the development of the Future Land Use and other sections of the Master Plan and will provide a tool for future decisions and planning.

2. **Leadership Development.** Current staff and community leaders as well as volunteers will build new confidence, skills, and abilities in planning and community engagement. The base of community members who are aware of and involved in civic dialogue or leadership will expand.

3. **Improved Community Engagement.** New community engagement tools and resources will be introduced or developed. Staff, leaders, and volunteers will be trained in the use of these tools and will develop new skills. The public will learn to expect to be engaged in community decisions, and local leaders will be willing and capable of doing so, which will open up new opportunities for civic engagement and community development.

4. **Stronger Individual Relationships.** This process will build skills among community members for constructive communication and will foster understanding of and respect for diverse opinions and perspectives, strengthening our capacity to productively address the challenges we face.

5. **Stronger Organizational Relationships.** This project will connect formal government structures to established organizations with grassroots efforts. Over the course of the activities, capacity-building, and planning work that we do in our community, we'll build lasting mechanisms to strengthen links between grassroots efforts and formal government and improve the flow of timely information between them.

6. **Coordination Between Municipal Departments.** This project will strengthen coordination between municipal departments including Capital plans, infrastructure construction, and maintenance issues, and coordination of data and enforcement, including site visits and documentation.

7. **Better Communications and Access to Information.** The project team will develop communication tools and strategies that can be use long after project completion. This will include a website and social media outlets as well as new capacities for staff and volunteers.
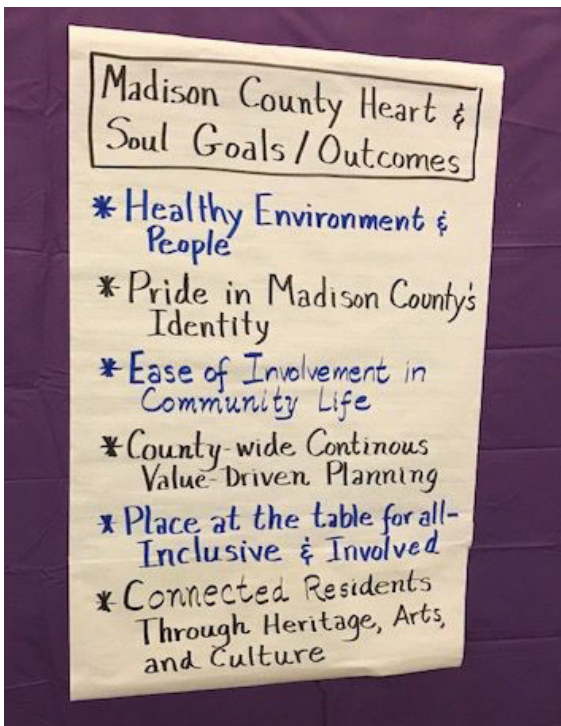
In Laconia, NH, the community hosted a charrette to collaborate on a community vision.
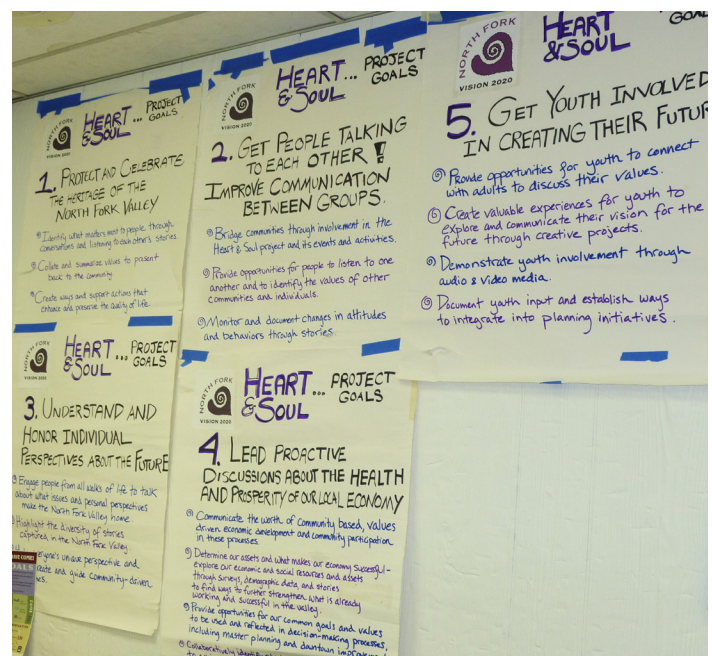
North Fork Valley, CO, used flipchart to write down their Project Goals and had them on display in their office.

Madison County, Iowa

Meadville, Pennsylvania

"Our goal is to boost community pride and involvement while reducing social, racial, and economic divisions by increasing community participation in local decision-making."

North Fork Valley, Colorado

1. Protect and celebrate the heritage of the North Fork Valley

2. Participate in proactive discussions about the health and prosperity of our local economy

3. Create economic opportunities and good jobs

4. Get people talking to each other! Improve communications between groups

5. Understand and honor individual perspectives about the future

6. Get kids involved in creating their future

San Elizario, Texas

1. Bringing the community together to improve quality of life in the city of San Elizario

2. Building a strong foundation between the community and its local government

3. Obtain a partnership with local government in order to address any issue

4. Creating educational opportunities for the community

5. UNITE our community as a whole

BONNER CURRICULUM (NORTH, SOUTH, EAST, WEST ACTIVITY)

North

Approaches to Work/Work Style:

- Assertive, active, decisive
- Likes to determine course of events and be in control of professional relationship
- Enjoys challenges presented by difficult situations and people
- Thinks in terms of "bottom line"
- Quick to act or decide; expresses urgency for others to take action
- Perseveres, not stopped by hearing "No," probes and presses to get at hidden resistances
- Likes variety, novelty, new projects
- Comfortable being in front
- Values action-oriented phrases, "Do it now!", "I'll do it", "What's the bottom line?"
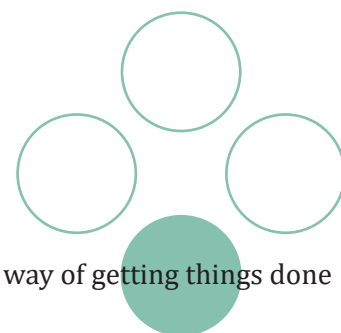
Overuse: Style Taken to Excess:

- Can easily overlook process and strategic planning when driven by need to act and decide
- Can get defensive, argue, try to "out expert" others
- Can lose patience, pushes for decision before its time, avoids discussion
- Can be autocratic, want things their way, has difficulty being a team member
- Sees things in terms of black and white, not much tolerance for ambiguity
- May go beyond limits, get impulsive, disregard practical issues
- Not heedful of others' feelings, may be perceived as cold
- Has trouble relinquishing control - find it hard to delegate, "If you want something done right, do it yourself!"
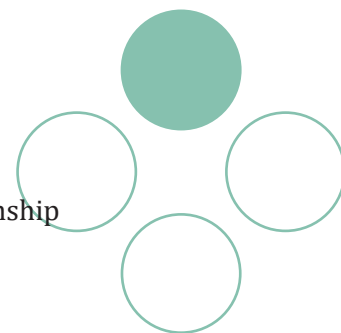
South

Approaches to Work/Work Style:

- Understands how people need to receive information in order to act on it
- Integrates others input in determining direction of what's happening
- Value-driven regarding aspects of professional life
- Uses professional relationships to accomplish tasks, interaction is a primary way of getting things done
- Supportive to colleagues and peers
- Willingness to trust others' statements at face value
- Feeling-based, trusts own emotions and intuition, intuition regarded a "truth"
- Receptive to other's ideas, builds on ideas, team player, noncompetitive
- Able to focus on the present
- Values words like "right" and "fair"

Overuse: Style Taken to Excess:

- Can lose focus on goals when believes relationships or people's needs are being compromised
- Has trouble saying "No" to requests
- Internalizes difficulty and assumes blame
- Prone to disappointment when relationship is seen as secondary to task
- Difficulty confronting or handling anger (own or others'); may be manipulated by emotions
- Can over-compromise in order to avoid conflict
- Immersed in the present or now; loses track of time; may not take action or see long-range view
- Can become too focused on the process, at the expense of accomplishing goals

Approaches to Work/Work Style:

- Visionary who sees the big picture
- Generative and creative thinker, able to think outside the box
- Very idea-oriented; focuses on future thought
- Makes decisions by standing in the future (insight/imagination)
- Insight into mission and purpose
- Looks for overarching themes, ideas
- Adept at and enjoys problem solving
- Likes to experiment, explore
- Appreciates a lot of information
- Values words like "option," "possibility," "imagine"
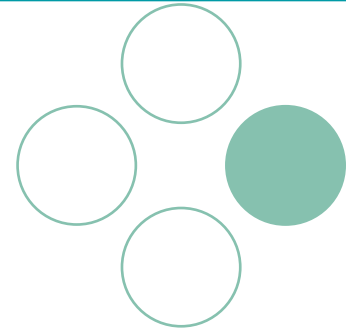
Overuse: Style Taken to Excess:

- Can put too much emphasis on vision at the expense of action or details
- Can lose focus on tasks
- Poor follow through on projects, can develop a reputation for lack of dependability and attention to detail
- Not time-bound, may lose track of time
- Tends to be highly enthusiastic early on, then burn out over the long haul
- May lose interest in projects that do not have a comprehensive vision
- May find self frustrated and overwhelmed when outcomes are not in line with vision

West

Approaches to Work/Work Style:

- Understands what information is needed to assist in decision making
- Seen as practical, dependable and thorough in task situations
- Provides planning and resources, is helpful to others in these ways and comes through for the team
- Moves carefully and follows procedures and guidelines
- Uses data analysis and logic to make decisions
- Weighs all sides of an issue, balanced
- Introspective, self-analytical, critical thinker
- Skilled at finding fatal flaws in an idea or project
- Maximizes existing resources - gets the most out of what has been done in the past
- Values word like "objective" "analysis"
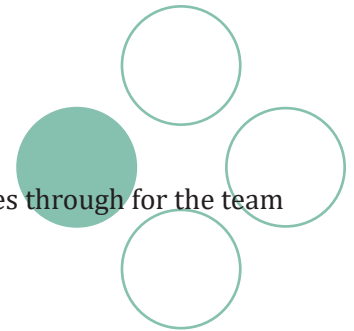
Overuse: Style Taken to Excess:

- Can be bogged down by information, doing analysis at the expense of moving forward
- Can become stubborn and entrenched in position
- Can be indecisive, collect unnecessary data, mired in details, "analysis paralysis"
- May appear cold, withdrawn, with respect to others' working styles
- Tendency toward remaining on the sidelines, watchfulness, observation
- Can become distanced
- May be seen as insensitive to others' emotions or resistant to change

COMMUNITY HEART & SOUL SUB-TEAMS

Community Heart & Soul is led by a diverse group of community volunteers. They bring their skills and talents to the table as they work hand in hand with the Project Coordinator(s) and other community volunteers. The Heart & Soul Team is not just a group of people who advise others on how to do the work; it is a working team, and members roll up their sleeves and participate in all aspects of community engagement.

What gifts do you have to offer? What strengths would you like to share with the community and the Heart & Soul Team? Below is a list of common Heart & Soul sub-teams. Take a moment to review them and note which might be of interest to you.

Event Planning Sub-Team (Phases 1-4)

Event planning is needed throughout Heart & Soul. This sub-team works with the Project Coordinator to flesh out the details for events as envisioned by the Heart & Soul Team and to plan and implement all logistics for community-wide events and neighborhood activities. (The Event Planning Checklist is a helpful tool.)

- Works with the Project Coordinator to ensure planned activities are within budget

- Identifies and secures sites for each event and provides guidance for other groups in the community who host Heart & Soul events

- Arranges food, childcare, transportation, interpreters, and all other aspects of events that make them accessible for target audiences

- Manages and troubleshoots events with Project Coordinator(s)

- Coordinates publicity with Communications Sub-Team

- Manages volunteers and/or staffing for events

- Ensures that any volunteers, speakers, and/or facilitators have the information that they need to carry out the event and meet the event goals

- Assists the Project Coordinator(s) in conducting a "new volunteer orientation" and assists in organizing volunteer celebrations

- Organizes refreshments, meeting room, and equipment for Heart & Soul Team meetings and training workshops

The Cascade Heart & Soul Event Sub-Team organized and hosted a Heart & Soul event at a local business.

- Updates and refers to the Heart & Soul Work Plan, as needed

Story Gathering Sub-Team (Phases 1-3)

The Story Gathering Sub-Team is primarily needed during the end of Phase 1 through Phase 3. This sub-team uses the Community Network Analysis and the Story Gathering strategy tools to ensure that all demographics are reached in story gathering. They also ensure that Story Gathering events are designed to adequately capture people's stories and participant data, as well as to promote relationship-building and connections. In Phase 3, they coordinate the process of gathering ideas for action related to the Heart & Soul Statements.

- Strategizes with the Project Coordinator(s) to create a Story Gathering plan using the Community Network Analysis (The Story Gathering Strategy Worksheet will be introduced during the Phase 2.1 workshop.)

- Establishes and manages interview and small group storytelling schedules as part of events or individual outreach efforts

- Calls and confirms appointments for thick stories and interviews, if needed

- Collects interview sheets and ensures the proper identification (story identification number) is on each sheet

- Follows up with fellow team members to ensure completion of interviews/storytelling sessions

- With Data Management Sub-Team, establishes system for tracking participant counts and demographics and progress toward meeting outreach and engagement targets set in project plan and based on Community Network Analysis

- Works with Story Listening Sub-Team to ensure that there is a consistent flow of stories for story listening groups

- Using the Community Network Analysis and the Heart & Soul Statements, develops a strategy for gathering ideas for action

- Updates and refers to the Heart & Soul Work Plan, as needed

Story Listening Sub-Team (Phase 2)

The Story Listening Sub-Team trains story listeners in listening bias, organizes Story Listening events, and liaises with the Story Gathering and Data Management Sub-Teams.

- Strategizes with the Project Coordinator(s) to create a Story Listening Strategy

- Designs a short orientation and training for volunteer story listeners

- Establishes and manages small group Story Listening schedules

- Organizes space and materials for Story Listening Groups

- Follows up with fellow team members to ensure follow through on Story Listening sessions

- Using the Community Network Analysis, works with the Data Management Sub-Team, ensuring that story listeners are providing data in the correct format for inclusion in the Data Management System

- Works with Story Gathering Sub-Team to ensure that there is a consistent flow of stories for Story Listening Groups and to provide feedback on Story Gathering techniques

- Works with Communications Sub-Team to share stories back with the community

- Updates and refers to the Heart & Soul Work Plan, as needed

Data Management Sub-Team (Phases 1-3)

The Data Management Sub-Team is responsible for data entry and data management, as well as providing reports on data to the Heart & Soul Team.

- Enters all data from thin and thick engagement into the Master Spreadsheet and code with a theme, sub-theme, and data type

- Enters all demographic data for individuals and groups

- Maintains a master list of themes and sub-themes to help facilitate data categorization and analysis

- Prepares data to be used to create Heart & Soul Statements. The Data Management Team will be asked to help prepare data in advance of the Phase 2.2 Workshop: Identify What Matters Most.

- Provides information to the Heart & Soul Team comparing demographics of storytellers with the Community Network Analysis to assess efforts at reaching different target audiences

- Provides information to the Heart & Soul Team on the relationship between themes and demographics (e.g. young people are generally saying that the local economy matters most)

- Provides reports to the Heart & Soul Team on common themes from stories and works with the Team to reflect this information back out to the community

- Transcribes stories and organizes transcription when needed

- Updates and refers to the Heart & Soul Work Plan, as needed

Communications Sub-Team (Phases 1 -4)

The Communications Sub-Team works with the other sub-teams to ensure that well-crafted and thought-out communication flows to the community using various communications channels. This sub-team may designate specific roles within the team, including webmaster, social media manager, a local media liaison, photographer, graphic designer, videographer, and video editor.

- Maintains social media updates; media campaign management and oversight (website, Facebook, Instagram, Twitter, etc.)

- Keeps track of deadlines and works with media outlets and communication channels to provide updates to the community and target audiences

- Assists the Heart & Soul Team with messaging

- Compiles information to share about the process (promote events and activities and report out on progress to the entire community)

- Ensures that community members know how to access Heart & Soul materials (meeting notes, budget, Work Plan, etc.) if interested

- Creates a document of final Heart & Soul Statements that can be approved or adopted by town officials and other local leaders in the community

- Reaches out to local service, non-profit, and civic organizations to educate the community about the Heart & Soul process and to keep them involved, excited, informed, and educated on Heart & Soul activities and outcomes

- Works with the Project Coordinator(s) and Communications Sub-Teams on a Story Sharing Strategy (see Planning for Story Listening and Sharing Focused-In Training) and uses creative ways to share stories back with the community

- Updates and refers to the Heart & Soul Work Plan, as neededage into viewable chunks

*Videographer/Video Editor (Phases 1 -4)

This optional position works with the Project Coordinator(s), Communications Sub-Team, and Heart & Soul Team to record story sharing and create videos. The bulk of work is done in Phase 2 with Story Gathering, Listening, and Sharing; however, it's always great to capture video of events and activities throughout the process.

- Captures raw footage of interviews and other events

- Assembles the footage into viewable chunks

- Creates a B-Roll of the community and surrounding areas of interest

- Compiles stories to be shared and celebrated

*Graphic Designer (Phases 1-4)

This optional position works with the Project Coordinator(s) and Communications Sub-Team to prepare both print and web materials to ensure a professional image.

- Designs layout for the website

- Works with Team to design Heart & Soul logo

- Creates posters/flyers

- Creates event materials

Thomston-Upson Heart & Soul Story Gathering Team collected thin data at the town's annual Emancipation Day event.

HEART & SOUL PROJECT COORDINATOR JOB DESCRIPTION

As your Heart & Soul Team creates the job description for your Project Coordinator, refer to this list of skills and desired qualifications. You can modify this job description based on your Heart & Soul Team's specific needs.

Community Heart & Soul® Background

To be completed by Heart & Soul Team

Description of Project Coordinator Position

To be completed by Heart & Soul Team

Project Management

- Alongside the Heart & Soul Team, utilize the Work Plan to map out the Team's work for each phase, while managing and revising the Work Plan throughout the phases

- Alongside the Heart & Soul Team, integrate the Community Network Analysis into Heart & Soul work and decision-making throughout the phases, and make additions and revisions to the Community Network Analysis, as needed

- Work with the Communications sub-team and other partners to design, schedule, and advertise all Heart & Soul-related meetings and events

- Work with the Heart & Soul Team and its sub-teams to develop and manage strategies for achieving Heart & Soul Milestones and create opportunities to celebrate the Team's successes along the way

- Work with the Heart & Soul Team to complete the *Community Heart & Soul Town Progress Tracker* and any additional project documentation at the end of each phase

- Develop and maintain regular communication with the Heart & Soul Coach (if applicable), the Heart & Soul Team, and any other community partners and municipal contacts

- Manage project records including communications materials, strategic documents, meeting minutes, public meeting summaries, etc.

- Manage financial records and budget, grants, and any other additional contracts for the Heart & Soul process

Heart & Soul Volunteer Management

- Work with the Heart & Soul Team to recruit, onboard, and orient new volunteers for Heart & Soul work

- Work with all sub-teams to ensure coordination and alignment in tasks and activities

- Work with the Heart & Soul Coach and other Team members to motivate and encourage volunteers who contribute to Heart & Soul activities

- Coordinate and organize the logistics for Heart & Soul Team meetings (space, food, task reminders to volunteers, agenda, meeting materials, etc.)

Workshop Coordination and Facilitation

- Liaise with Heart & Soul Coach to prepare workshop information and distribute materials to Heart & Soul Team members

- Work with Heart & Soul Coach to facilitate designated components of Heart & Soul phase workshops and Focused-In Trainings

- Ensure that all Heart & Soul meetings, trainings, and workshops are documented, and that documentation is widely shared throughout the community

Desired Qualifications

- Demonstrated experience in community planning, community development, or another related field

- Experience with public outreach and community organizing

- Experience with project design, management, and evaluation

- Experience working with and coordinating teams and committees

- Familiarity with innovative planning tools and processes, particularly as they relate to community engagement

- Skills in active listening

- Excellent oral and written communication skills and comfort speaking publicly

- Experience with bringing together a wide variety of groups and diverse constituencies to achieve common goals

- Strong organizational skills and ability to manage multiple tasks

- Experience with a variety of communication technologies, including online formats and social media

- Commitment to the goals and approach of Community Heart & Soul

- Willingness to travel and work evenings

The Community Network Analysis

EXAMPLE COMMUNITY NETWORK ANALYSIS WORKSHEET

STEP 1 Know Your Community *List groups (informal and formal), neighborhoods, or other ways that your community is organized*				STEP 2 Demographic Cross-Check	STEP 3 Group Connectors *Someone who can connect you to others in the group*	STEP 4 Communicate		STEP 5 Engage	STEP 6 Follow up/ Reflect
Community group name (or description)	Are they a missing voice?	Anything special to note?	On Heart & Soul Team?	What demographic group(s) are represented in this community group? *Cross-check with Demographics tab*	Connectors (Names)	Where in your community do you "see" this group?	How can you reach out to this group?	Ideas for engaging this group in the future	Did you reach this group? Did you engage them? What worked?
Jamestown School District PTO	Not generally, but some of the families they represent are	The PTO has a large attendance at monthly meetings	Y	Crosses all demographics	Darvel Johnson (Pres)	At all school events	They have an email list; they might be able to mention something in their regular email blasts	Get on the agenda for one of their meetings	
VETERANS Veterans- VFW Veterans- VFWA Veterans- unaffiliated	Sometimes		Y	Men and Women; Crosses various age categories	Joe (VFW) Jane (auxiliary) Harry (manages the Veterans Memorial in the square)		VFW monthly newsletter		
Business owners who don't live in the community	Yes	We don't have an official count of this group	N		Jessamyn Hosterman (Chamber member)	At their businesses	Not sure; through the chamber??	Attend a chamber meeting	
Springdale neighborhood	No	They are known as the trick or treat neighborhood	Yes		Scarlett Johnson (homeowner's assn pres)	Café Strasbourg			
Temple Beth Israel	No	They operate a soup kitchen in the winter months	Y		Rabbi J Goldstein Sally Kirch-Comms Mgr		TBI newsletter (weekly-sent electronically)		
Young, single parents	Yes	There is not a formal group structure	No	Generally in lower income brackets		At the city park; at the "Y" playgroup			

DEMOGRAPHICS TAB (FROM MASTER SPREADSHEET)

Category	Breakdown	% / Number of residents	Representation in Community Network Analysis Tool? (provide specific information)	Additional Information
Income	Less than $25K			
	$25K - $49K			
	$50K - $74K			
	$75K - $99K			
	$100K+			
Age	Under 6			
	6 - 19			
	20 - 24			
	25 - 34			
	35 - 44			
	45 - 54			
	55 - 64			
	65+			
Gender	F			
	M			
	Prefer not to reply			
Residency	Renters			
	Homeowners			
	Other			
Race and Ethnicity	Black or African American			Information on race and ethnicity categories in the US Census: https://www.census.gov/mso/www/training/pdf/race-ethnicity-onepager.pdf
	Native American or Alaska Native			
	Asian			
	Native Hawaiian or Pacific Islander			
	White			
	Hispanic or Latina/o			
	More than one			

MANY PERSPECTIVES FROM DIVERSE VOICES

Review this list to identify ways to enhance your Community Network Analysis. This relates to work from *Who Lives, Works and Plays in Our Community* (Getting Ready Training Package) and the **Phase 1: Lay the Groundwork Workshop.**

Work

Business/Professional Community

- Auto dealers and repair shops
- Retail store owners and managers
- Service sector/hospitality providers
- Farmers and ranchers
- Manufacturers
- Artists
- Commercial fishers
- Home-based businesses
- Utility companies and employees

Workforce

- Construction workers/tradespeople
- Teachers
- Government staff/municipal workers
- Retail and service employees
- Part-time employees
- Miners
- Police officers
- Firefighters/emergency service providers
- Healthcare providers

Community Members and Groups

- Faith communities
- Families and loved ones of inmates
- LGBTQ community
- Low-income/low-resource community members
- Military members and their families
- Persons with disabilities
- People from diverse cultures
- Special clubs and interest groups

Housing

- Renters
- Seasonal/second homeowners
- Community members without permanent homes
- Homeowner associations

Age

Students/Young Adults

- Home/private school students
- Pre-school children
- K-12 students
- Community colleges/career and technical center students
- In the workforce, including farm or ranch laborers
- Returnees to the community
- Affinity groups like skateboarders and gamers

Parents/Guardians

- Single parents
- Foster parents
- In-home and larger scale daycare providers
- Parents in groups or organizations associated with students or school

Seniors

- Retirees
- In the workforce
- Living at home
- Living in senior housing
- Living at home with assistance/day care
- Living in care facilities

Spreading the Heart & Soul Word

EXAMPLE PRIORITIZING COMMUNICATION CHANNELS

	School District	Veterans	Business Owners	Neighborhoods	Faith-based groups	Young parents	Total
Traditional Media							**5**
Local Newspaper	X		X				2
Radio			X	X		X	3
Social Media							**6**
Twitter				X		X	2
Facebook	X	X		X		X	4
Gatherings							**3**
Regular Meetings	X	X	X				3
Gathering Places							**13**
Library			X	X		X	3
Town Park			X		X	X	3
Farmers' Market	X		X	X	X		4
Diner		X	X		X		3
Events							**9**
Downtown Festival	X	X	X	X	X	X	6
Block Party		X		X	X		3
Total	**5**	**5**	**8**	**7**	**5**	**6**	**36**

COMMUNICATION PLAN BASICS

A Communications Plan will help you get the right information to the right people at the right time. This is where the work of the Community Network Analysis is combined with a communications strategy to keep your community informed and engaged. Key steps include:

Communications Goals

Articulate what your Team wants to accomplish through communications. Every Heart & Soul project should include this goal:

- Build awareness, interest, and commitment in all segments of the community

Core Messages and Branding

Develop key messages and a brand that will resonate with your community

Communication Activities (Tactics)

Internal Communications

How will you communicate with the Heart & Soul team and the wider community about meeting times, events, and updates? How often?

The Grand Lake Heart & Soul Team designed a logo with water and trees to reflect the natural environment the town is proud of.

Audiences

Refer to the Community Network Analysis—your audiences are the community groups and networks. Identify any audiences, including local decision-makers and hard-to-reach voices, that may need special attention and dedicated resources when it comes to communication

Channels

Assess your media assets—local media, interested reporters, etc. (An initial list is created during the Phase 1 Workshop.)

Prioritize channels to reach different audiences. Refer to the Prioritizing Communication Channels worksheet

Identify how you will use traditional and non-traditional channels, such as Press releases, letters to the editor, photos, Facebook, etc. most effectively

Messengers

Use the Community Network Analysis to identify potential messengers—these are often the network connectors that are a trusted voice for a group or network in the community
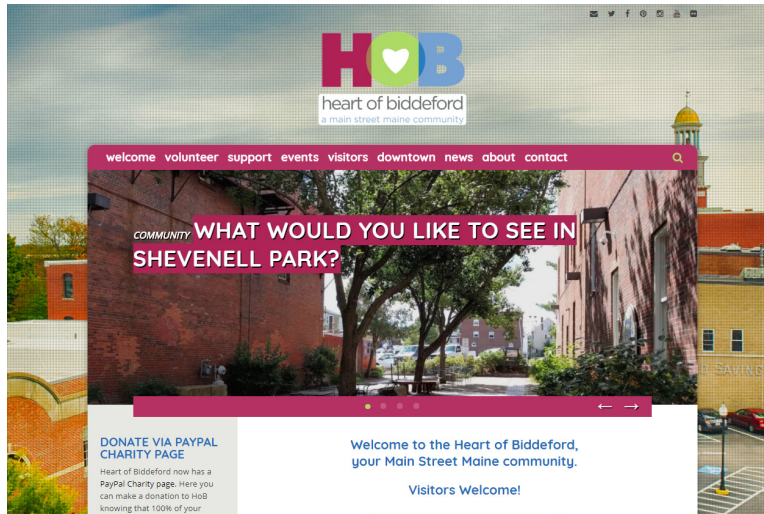
Collateral Materials and Marketing Tools

Identify collateral materials that the Communications Sub-Team will develop such as talking points, process maps, presentations, newsletters, and videos that help share your message.

List marketing tools that the Communications Sub-Team will create and maintain—e.g. websites, social media, newsletters, and blogs

Heart of Biddeford, ME, keeps up community communications by regularly updating their website.

Integration with Heart & Soul Work Plan (Timeline and Budget)

For each event, milestone, and effort, identify clear deadlines, budget, and person responsible. Work with the Project Coordinator and Heart & Soul Team to integrate the Communications Plan objectives, tasks, budget, and person responsible into the Work Plan.

The North Fork Valley Heart & Soul Project, CO, tracked their communications and shared their efforts with an infographic.

Measurement

Develop realistic targets (e.g., how many Facebook "Likes," how many attendees at events)

Set up a tracking system for your communication activities

Determine how the Communications Sub-Team will assess which channels are working to achieve communications goals and project goals

COMMUNICATION ACTIVITIES

Distribution Date	Type of Information	Key Message/Purpose of Communication	Information Prepared by	Information Reviewed/ Approved by	Audiences	Communications Assess Needed	Communication Channels
15-Jan	Heart & Soul Team Meeting Minutes	Provide updates on decisions and upcoming activities	Project Coordinator	Heart & Soul Team	Heart & Soul Team, Network Connectors	Draft version of meeting minutes	Heart & Soul Website; Direct email to network connectors
22-Jan	Heart & Soul launch event announcement	Build awareness about Heart & Soul (what is it, why are we doing it) and generate interest in launch event	Communications Sub-Team	Heart & Soul Team	Business owners, local residents, network connectors	Press release and short blurb with information about launch event. Photo/ logo if available	Press release for local media; Facebook event on social media; direct email to network connectors
5-Feb	Heart & Soul Launch recap	Demonstrate community interest in Heart & Soul through launch event	Communications Sub-Team	Project Coordinator	Heart & Soul Volunteers (including Heart & Soul Team), network connectors, local residents	Photos and videos from launch event	Facebook; direct email to network connectors and Heart & Soul volunteers
10-Feb	Heart & Soul Team Meeting Announcement	Promote attendance at monthly Heart & Soul Team Meeting	Project Coordinator	n/a	Heart & Soul Team, prospective team members	Team meeting agenda	Heart & Soul email list; Facebook event, Heart & Soul website
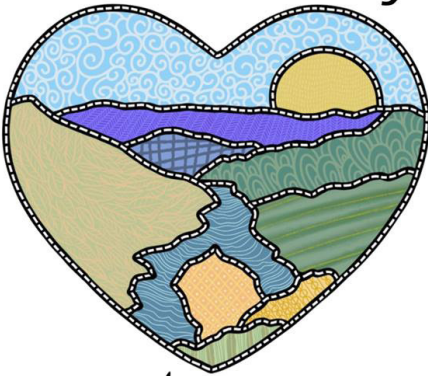
HEART & SOUL TEAM INTEREST FORM

If you are interested in sharing your gifts with [TOWN NAME] by serving on our Heart & Soul Team or otherwise volunteering to help with our Heart & Soul effort, please complete this form and submit it to [NAME] at [E-MAIL] or drop it off at the Heart & Soul office at [ADDRESS] as soon as possible. Any questions, comments, or concerns may also be directed to [NAME].

My Interest

☐ I am interested in being a part of the Heart & Soul Team. I understand that this will include:

- Participation in monthly meetings of the Team as well as any relevant sub-team meetings;
- Serving as a connector (see below); and
- Pitching in where needed at Heart & Soul events.

☐ I am interested in volunteering to support the Heart & Soul effort either by assisting with discrete tasks or serving on a subcommittee of the Heart & Soul Team.

☐ I am not sure exactly what I would like to do, but I would like to discuss the volunteer options with someone.

Serving as a Connector

☐ I can help engage the following group(s) in *[TOWN NAME]*:

☐ Lifelong Community Members	☐ Young Parents/Parents of Young Children
☐ Returners to the Community	☐ New Residents
☐ Retirees	☐ Low Income Community Members
☐ Medical Community	☐ Industry and Business Owners
☐ Young Professionals	☐ Education Community (K-12)
☐ High School Students	☐ Faith Community
☐ Agriculture Community	☐ Arts Community
☐ Other: _____	☐ Public Leaders
☐ Other: _____	☐ Racial/Ethnic Minority Group: _____
☐ Other: _____	☐ Racial/Ethnic Minority Group: _____
☐ Other: _____	☐ Racial/Ethnic Minority Group: _____
☐ Other: _____	☐ Racial/Ethnic Minority Group: _____

Joining a Sub-Team

Please check the boxes next to the sub-teams that interest you.* Please indicate:

- Whether you are interested in serving in a **lead** or **support** role on a sub-team

- Whether you bring skills/experience, or you would like to *gain* skills/experience

Heart & Soul Sub-Team	Lead	Support	Skilled/ Experienced	Gain Skills/ Experience
Event Planning Sub-Team	☐	☐	☐	☐
Story Gathering Sub-Team	☐	☐	☐	☐
Story Listening Sub-Team	☐	☐	☐	☐
Data Management Team	☐	☐	☐	☐
Communications Sub-Team	☐	☐	☐	☐
Videographer (part of Communications)	☐	☐	☐	☐
Graphic Designer (part of Communications)	☐	☐	☐	☐
Other (please specify):	☐	☐	☐	☐

*The handout, *Community Heart & Soul Sub-Teams*, provides information about each Sub-Team.

Contact Information

Name:	
Phone:	
Email:	
How do you prefer to be contacted?	☐ Phone ☐ Email ☐ Other (please specify):

Heart & Soul of Essex, VT, Heart & Soul Team

Upper Chichester, PA, Heart & Soul, Heart & Soul Team

PLANNING A HEART & SOUL LAUNCH IN YOUR COMMUNITY

In the Phase 1: Lay the Groundwork Workshop, we focused on creating your Heart & Soul identity, "branding" your Heart & Soul, and talking about Heart & Soul in your community.

You may organize an official community "launch" of Community Heart & Soul. Why is this important? You want to make great lasting impressions. The way that you build awareness and get the word out about Heart & Soul will set a foundation for positive dialogue, increased community engagement, and community support for Community Heart & Soul.

Here are some considerations when planning a Heart & Soul launch:

In Colorado, the Grand Lake Heart & Soul Project kicks off with an outdoor summer event.

- Think about your community's "seasonal calendar." What else is going on in your community, and when is it happening? Are there other, established local events that you could join? Where can you reach the most people? And when is a time when you shouldn't organize a launch, based on your community's seasonal calendar?

- How do you want to make that lasting, positive impression? What do you think you can do to gain people's interest and support for Community Heart & Soul?

- Think about your messaging. What do you want to convey to your community about Community Heart & Soul? How can you make it succinct, direct, and powerful?

- Think about how you want to present Community Heart & Soul. It goes beyond messaging; it is also about who is being represented. How can you ensure that you are reflecting the Heart & Soul principle, "Involve Everyone?"

- What are some initial easy wins that could propel your Heart & Soul forward?

- How can you leverage local media to promote and cover your Heart & Soul launch?

- What communication channels can you use to let people know about the launch?

- Refer back to your Community Network Analysis. Who (connectors) can help you plan launch activities to reach the missing voices in your community? How will you prioritize activities to ensure underrepresented groups are heard?

- Do you need to think about budget for any of your launch ideas? Make sure that you consider how you are going to cover costs, if there are any.

- How might you be able to get others involved in your Heart & Soul launch? Networking for support is very important!

- After you organize some "soft launch" activities, what might you aim for with an official community-wide launch activity?

EVENT PLANNING CHECKLIST

This document provides a suggested list of logistics to think about as you plan your event, which can be tailored for the needs of your community and the specific event.

Pre-Event Planning

- ☐ Check the community event calendar and make sure your date doesn't conflict with other events
- ☐ Identify a venue
- ☐ Is there a budget?
- ☐ Is there enough time for adequate notification and outreach before the event?
- ☐ Is the potential event time convenient and feasible for the audience?

Pre-Event Logistics

- ☐ Daycare/children's activities
- ☐ Translators
- ☐ Publicize public transit lines servicing the event location
- ☐ Shuttle for rides to and from specific neighborhoods
- ☐ Ensure potential venue is accessible (e.g., bus, stairs or ramp, elevator)

Meal/Refreshments

- ☐ _____ is/are responsible for catering & set-up
- ☐ Food (add detail)
- ☐ Plates, napkins, cups, utensils
- ☐ Drinks/ice (add detail)
- ☐ Serving pieces
- ☐ Clean-up supplies

Equipment & Materials Set-Up

- ☐ _____ is/are responsible for setting up equipment
  - ☐ Is any A/V equipment available and at what cost?
- ☐ Screen
- ☐ Projector and cables

- ☐ Laptop and cables
- ☐ Extension cords/surge strip
- ☐ Sign-in sheet
- ☐ Nametags
- ☐ Agenda
- ☐ Other handouts
- ☐ Sign(s) for door and tape
- ☐ Back-up of the presentation
- ☐ Digital camera
- ☐ Other equipment/materials (e.g., flipcharts, easels, sticky tack, markers, paper, pens)

Venue Set-Up and Break-Down

- ☐ _____ is/are responsible for setting up the room and breaking it down
  - ☐ Decide on layout (# and arrangement)
  - ☐ Where to put trash/recycling?
  - ☐ Will someone be on-site to open and/or lock up?
- ☐ Tables for projector, speakers, food/drink, sign-in, handouts
- ☐ Trash receptacle
- ☐ Extra chairs (find out if/where available)
- ☐ Ask about parking (if it is not obvious and whether there are any special directions)
- ☐ Emergency contact number for facility's point person

Post-Event Debrief

- ☐ Refer to your Community Network Analysis — who was not in the room, develop a plan to reach them
- ☐ Post to your social media, local news, etc., overview of the event to continue to build energy and support
- ☐ Thank your volunteers publicly

WORK PLAN TEMPLATE FROM PHASE 1

Milestone	Task *What steps need to be taken in order to complete this Milestone?*	Person Responsible *Who is going to manage this task to ensure it is completed?*	Start Date *What date did this Milestone begin?*	Deadline *If there is an end date, when should this Milestone be completed?*	Notes *Include any additional information that would be helpful for the Heart & Soul Team to know*
Initial community analysis (such as the Community Network Analysis) created	Take info from Getting Ready "formal groups" brainstorm and input in Master Spreadsheet	Jared	May 1	May 5	
	Give Team access to Master Spreadsheet to work on CNA	Jared	May 1	May 1	Do we need to discuss any protocol around adding to CNA in the spreadsheet?
	Organize "Brainstorm Meetings"	Janet	May 10	July 31	Schedule 30 mins with PTO and Rotary to introduce CNA and brainstorm
	Ask Mr. Rodgers if 9th grade civics course is interested in CNA work	Christina Lee	May 5	May 5	Depending on response, plan next steps to visit classroom
Pool of volunteers assembled for initial Heart & Soul activities					
Local officials/town government linked into Heart & Soul Team activities					
Sub-teams created for specific tasks/jobs	Attach interest form to a Facebook post	Jared	May 1	May 10	Is there a way to make it an electronic input form? (maybe Wufoo?)
	Leave interest forms at library circulation desk	Monique	May 1	May 10	Talk to librarian about collecting forms for us
	Input interest form info into Master Spreadsheet	Derek	Rolling	Rolling	

Milestone	Task *What steps need to be taken in order to complete this Milestone?*	Person Responsible *Who is going to manage this task to ensure it is completed?*	Start Date *What date did this Milestone begin?*	Deadline *If there is an end date, when should this Milestone be completed?*	Notes *Include any additional information that would be helpful for the Heart & Soul Team to know*
Sub-teams created for specific tasks/jobs					
Project Coordination plan created					
Overarching Heart & Soul Goals and Geographic Area written					
Phase 1 Objectives and Tasks mapped out					
Phase 1 Budget mapped out and general outline of budget for remaining phases created					
Development of core messaging and marketing tools underway	Talk with Circle Graphics about donating posters	Dawn	May 15		Size negotiable
	Radio time- ask John at station	Jared	May 10	Will ask after Chamber mtng	Will need to revise "Grocery Line" Speech to use on air
	Facebook management	Sasha	May 1		Public group; will Sasha be admin?
Heart & Soul launched publicly					
Reflect and Celebrate!					

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