

Who is Engaging Stakeholders Well?

Orton Family Foundation

Vermont foundation adopts high-engagement approach to supporting cities and towns to design a brighter future.

Quick Grantmaker Stats

Type of funder	Family (operating) foundation
Geography/Issue Area	Small cities and towns/civic engagement, value based planning.
When founded	1995
Total assets (as of FY 2013)	\$15 million
Annual giving (as of FY 2013)	Annual operating budget of \$2 million
Number of staff	10
Website	www.orton.org
Brief description of the program/practice being discussed	A high-engagement approach to help residents of small towns and cities discover community shared values that serve as the foundation for future decisions.

1. Describe the situation or practice.

“Either you decide your community’s future, or someone else will.” Those words, from the website of the Orton Family Foundation, describe the ideas behind its Heart & Soul initiative, aimed at driving citizen engagement in community planning and development. It is a focus that came from the foundation’s founder, Lyman Orton. A seventh-generation Vermonter who established the retailing company Vermont Country Store, Orton saw that many communities around the state were unprepared for growth and lacked the information and tools needed to create a vibrant, sustainable future. “Our approach is rooted here, in the fundamental belief that the strength of a community lies in the hands, and the hearts, of its citizens,” the foundation states.

2. What have you tried to do differently?

In 2008, the Orton Family Foundation launched a five-year, \$10 million initiative to create the Community Heart & Soul program. Through the

program, the foundation generally provided community partners with \$100,000 in training, resources and technical assistance over two years. The foundation supports storytelling, community conversations and other facilitated dialogue techniques aimed at surfacing shared community values and creating an action plan for the community's future. After 10 demonstration projects across New England and the Rocky Mountain West, the foundation currently is weighing how to scale Community Heart & Soul to more small towns and cities nationwide.

The Orton Family Foundation is based in Middlebury, Vermont, so staff work to stay in touch with geographically dispersed Heart & Soul communities and create relationships that add impact to the work. In addition to biweekly calls and frequent visits with grantees, staff facilitate reflective sessions with the communities to explore what is working and what needs to change, as well as how the foundation can better support the community's work.

Based on what staff members hear at these sessions, the foundation often will provide additional training (for example, in cultural competency) or make other changes to allow the grantee to adjust or refocus its work. "This level of engagement has helped us really learn how to develop and shape Heart & Soul to be an effective and powerful tool designed specifically for small towns," said David Leckey, executive director.

Orton also creates opportunities for peer networking among the communities it is supporting across the country. All grantees get together at the outset of their projects for on-site training. In addition, the foundation brings grantees together for three trainings over the two-year grant period, hosts a listserv and conference calls on key topics emerging in the work, and offers to cover the costs of visits by project leaders to other towns.

About Heart & Soul

The Orton Family Foundation has advanced an approach to community planning and development called Heart & Soul. The foundation refers to Heart & Soul as a "barn-raising" approach designed to increase participation in local decision-making and empower residents to shape the future of their communities in a way that upholds the unique character of each place. Heart & Soul reconnects people with what they love most about their town, and translates those personal connections into a blueprint that serves as the foundation for future community decisions. For more information: http://www.orton.org/what-we-do/heart_soul.

3. What has been the result?

The Heart & Soul process has delivered inspiring results in small cities and towns across the country. In Biddeford, Maine, the Heart & Soul process helped the local Main Street organization, Heart of Biddeford, revitalize the local downtown. The HeartWorks project devoted three years to talking with people in Biddeford about downtown — including what their memories are, what their hopes are and what their concerns are.

These conversations resulted in a new Master Plan for Downtown, which Heart of Biddeford describes as “a roadmap for how the community can make Downtown a better place where people want to live, work, shop, have fun and operate a business.” The final draft of the plan was presented in 2011 and has led to the launch of several projects, including the Main Street Challenge competition, which awards forgivable loans, special bank rates, in-kind services and other incentives to downtown businesses. It also ignited an ongoing connection between the high school and the downtown organization, where youth now serve on the board. The plan also has resulted in increased visibility for cultural events and storefront redesign projects, and a new downtown presence of the University of New England through a town-gown partnership.

According to Delilah Poupore, executive director of the Heart of Biddeford, “We are now creating successful economic development by paying tribute to who we are and where we come from. Without that base, we risk trying to become some revitalized city instead of an evolving Biddeford which has culture and flavor and strengths that need to be maintained while adding the new.” For more information see: www.heartofbiddeford.org and <http://www.orton.org/projects/biddeford>.

“We see our role as partners with grantees in carrying out the work. We try to cultivate local relationships that allow us to learn and generate results that will make a real difference in the future of communities. We hope to connect with more partners to help bring these results to other people and places.”

— David Leckey, Executive Director, Orton Family Foundation

4. What are your key insights from doing the work?

Leckey said Orton's high-engagement approach relies on grantees who welcome the grantmaker's involvement. "Through this active engagement, we have on-going feedback about the work of Hear & Soul which has allowed us to be of service to the specific community while developing a model that can help other small towns."