



Polson Heart & Soul FAQ

What is the Polson Heart & Soul project?

The Polson Heart & Soul project is a two-year grant program for the purpose of reaching out to all members of the Polson community to engage in conversations about our future and how to ensure that Polson is economically vibrant and a great place for all of us to continue to live.

The project begins with discussing what community members love about Polson and why they choose to live here. These conversations will lead to development of central themes that represent the "heart & soul" of Polson, i.e., our commonly held concerns, values, and aspirations. By identifying shared community values and recommended actions to inform local community-driven and government efforts, we will be able to maintain what we love about Polson while providing for growth and change in positive directions.

The outcomes of the Heart & Soul project will be:

- A more unified community and more unified work/projects
- Growth in the community's ability to work together, have meaningful relationships and improved mutual understanding
- A vision for the future based on our community's values
- Programs for growing leadership skills among our youth
- Cooperation with and support of existing community organizations and groups
- There is a clear vision forward, grounded in our community values, that informs:
 - Community efforts and organizations like Envision Polson! and others
 - Community development goals for economic development and enhancement of quality of life
 - City planning decisions that respect property rights and are fair, efficient, and easier

The Heart & Soul project will include:

- Identification of commonly held community values through sharing personal stories
- Neighborhood events to ensure broad input and inclusiveness
- Surveys to refine and monitor the project success and citizens' opinions of it
- Community dialogue that gives everyone an equal voice and strives for common understanding, fairness in being heard, and respect
- Creation of a shared community vision but grounded in our shared values
- Citizen recommendations for community improvement projects that can be implemented by non-profits, volunteers, businesses, and local government

What is the Orton Family Foundation and why is it involved in charitable work with small towns?

The Orton Family Foundation was founded in 1995 by Lyman Orton and Noel Fritzinger, both residents of Weston, Vermont, population 630. Orton and his three sons are proprietors of The Vermont Country Store, a national mail/web order business, which was founded in 1946 by Lyman's father and mother.

Mr. Orton was serving on his small town's Planning Commission during a growth boom in the 1980's, and was disappointed to find that the Commission could not prevent some growth initiatives because the zoning bylaws that were in place left them powerless.

Feeling that small towns are special places that should never find themselves unprepared and lacking the information and tools needed to protect their character while continuing to grow and change in positive directions, Lyman and Noel established the Orton Family Foundation—an organization that would develop tools and resources to help small communities like Weston decide how they wanted to grow and implement policies to ensure that they worked toward a shared community vision.

What is the Orton Family Foundation's Heart & Soul grant about?

The Orton Family Foundation places a particular emphasis on supporting work that helps communities identify and protect their "heart and soul," and builds, through shared stories and communication, a culture around the importance of community character in planning. As Lyman Orton has stated, "when a community takes the time to get to know itself, it gains a sense of identity and purpose that informs decisions and planning."

Towns everywhere struggle to cope with rapid demographic, economic and other changes, and many end up losing what makes them special. The Orton Family Foundation believes traditional planning processes aren't enough to respond to the challenges and changes and keep our towns from becoming soulless shells of communities. These days top-down, isolated decision-making isn't enough to engage diverse, active, information-hungry citizens, who have the power to strengthen their communities in the face of change.

Believing that the key to successful communities is their heart and soul—the unique cultures, landscapes, traditions and values that people cherish—and with people themselves taking action to sustain and enhance the places they love, the Orton Family Foundation offers Heart & Soul grants to selected small towns in the Northeast and Rocky Mountain regions of the United States. The foundation's goals are to either give other communities the tools they need to manage growth in a positive way, or to deal with declining populations and economic stress.

How did Polson get the Heart & Soul grant?

To be eligible for the Heart & Soul grant, the city or town must be located in either New England (CT, MA, ME, NH, RI, or VT) or the northern Rocky Mountain region (CO, ID, MT, WY), and must have no more than 30,000 residents. It and must have either (1) a full-time town planner or (2) a community economic development staff or (3) a town manager that will participate in the project and help implement results, and must be prepared to experiment with new methods and tools that further the town's learning and capabilities around processes for community planning. Applicants must include an incorporated municipality (i.e., the City of Polson) and at least one local public, private or non-profit partner (i.e., the Greater Polson Community Foundation). They also were required to present a realistic preliminary project plan and budget with adequate funding match.

Winning applicants showed that they are ready to protect their unique character, deeply engage their citizens, and meet the challenges of the 21st Century, using the Heart & Soul grant program to assist them in achieving a more vibrant future.

In the spring of 2011, the Greater Polson Community Foundation (GPCF) became aware of the Orton Family Foundation and the Heart & Soul grant. The GPCF submitted a proposal and a [4-minute video](#) in July 2011, and in September 2011 learned that Polson was one of 10 finalists for the award. In its application budget and plan, the Greater Polson Community Foundation committed to match the \$100,000 Orton grant with at least \$25,000 cash and secured a commitment of partnership with local city government in the project. After a site visit in October, in December 2011, the Orton Family Foundation announced that Polson was one of five winners of the Heart & Soul Grant. Other small communities winning the 2-year, \$100,000 grants were Gardiner, Maine; Essex and Essex Junction, Vt.; Cortez, Colo.; and Paonia, Hotchkiss and Crawford, Colo., in a combined application called North Fork Valley.

Polson, with a population of approximately 5,000 is the smallest of the five selected towns, all with populations under 20,000. All "exhibited an acute awareness of their issues and demonstrated the desire to shake up the status quo, reinvent their planning processes and chart a course that will place them on a path to vital economic growth," the Orton Foundation said in a news release.

How is Polson's Heart & Soul project funded?

The Orton Family Foundation will commit up to \$100,000 over two (2) years to the Polson Heart & Soul project. Foundation funding is to support the community's use of innovative methods and tools that help increase citizen participation, identify and articulate community values, and implement values-based decision-making and action. Funds are to be used for direct project expenses such as staffing, consultants, supplies, events and implementation activities. Grant funds may not be used for overhead expenses, indirect costs or capital improvements.

Selected projects are required to provide at minimum a 1:1 match to Orton Family Foundation funds through a combination of cash contributions (a \$25,000 minimum including grants, existing budgets, donations, etc.) and in-kind resources over the life of the project. In-kind contributions may include donated services, materials and supplies; equipment; use of facilities; and professional staff time. The cash match to Polson's project is 100% funded by the Greater Polson Community Foundation.

What is Envision Polson! and how is it related to Polson Heart & Soul?

Envision Polson! is neighbors working with neighbors to positively impact their town. It is civic-minded, action-oriented volunteers who give their time and talents to work on a wide variety of large and small projects to do good things in the Polson community. Envision Polson! operates under the guidance of the Greater Polson Community Foundation (GPCF) and a Steering Committee comprised of community and civic leaders.

The Heart & Soul project is a 2-year grant program secured by the Greater Polson Community Foundation for the purpose of reaching out to all members of the Polson community to engage in conversations about what citizens love about Polson and why they choose to live here. These conversations will lead to development of central themes that represent the "heart and soul" of Polson, i.e., commonly held concerns, values, and aspirations. This citizen-based information will help organizations like the GPCF, Envision Polson!, and the City of Polson be in-tune with all of our citizens as they go about their good work.

Is the Orton Family Foundation affiliated with ICLEI or Agenda 21?

An independent not-for-profit organization, the Orton Family Foundation is funded entirely by Lyman Orton, proprietor of the Vermont Country Store, a family-owned mail order retailer based in Vermont. Lyman, a seventh generation Vermonter, is proud of his rural heritage and believes in the importance of individual responsibility and accountability.

Through the Foundation, Lyman has used profits from the Store to help small cities and towns keep their unique character in the face of change. He believes that the people who live and work in a town—not self-appointed experts—hold the answers to its challenges and its most successful future.

The Orton Family Foundation is not affiliated with ICLEI, nor the UN, nor Agenda 21. The Orton Family Foundation and ICLEI both provide how-to resources and tools for communities who chosen to pursue enhanced vitality, planning, sustainability and other efforts, and in this way there may be instances where Orton Family Foundation and ICLEI are shown together - but unrelated - as resources for those communities.

Again, the Orton Family Foundation is entirely funded by a by a business man who just happens to believe strongly in and provide funding for civic participation and local decision making and that enhancing unique community assets is essential to a vibrant local economy.

Who will be involved in Polson Heart & Soul?

Because a key goal for the Heart & Soul project is to involve as many people as possible in the greater Polson community, we hope that every citizen will be involved in the project during the two-year period. Opportunities for involvement span from simply showing up and sharing your ideas and opinions at a Heart & Soul event to helping organize or facilitate events.

The Heart & Soul grant will provide an opportunity for a Community Advisory Team (CAT) that is representative of the community to be formed to do the challenging and frequently underfunded work of hearing from as many community members as possible. About 20 – 30 people are needed to form the CAT, and a diverse membership is currently being assembled.

What is the Polson Heart & Soul timeline?

January 2012

- Project kick-off visit to Polson by Orton Family Foundation

February 2012

- Polson Project Coordinators hired
- Partnership Agreement with Preliminary Plan & Budget signed by Orton Family Foundation, Greater Polson Community Foundation, and City of Polson
- Project Coordinators & City Manager attend Heart & Soul Project Start-Up Training

March 2012

- Greater Polson Community Foundation signs lease to rent office space in North Lake County Public Library to establish Heart & Soul office
- Orton Foundation facilitator conducts Collaboration Training for project partners in Polson
- Polson Project Coordinators work on refining project plans & budget and putting processes and schedules into place

April 2012

- Project and budget revisions and first report on project progress and expenditures due to Orton Family Foundation
- Polson Heart & Soul offices opens
- Community Action Team recruitment begins

May - June 2012

- Community Action Team formalized

Summer 2012 – Winter 2012

- Project Kick-off Event
- Community personal story gathering activities throughout the Polson community
- Draft community values identified and prioritized

Who do you contact about getting involved in Polson Heart & Soul?

Stop by the Polson Heart & Soul office at the North Lake County Public Library, or call us!

Location:

Polson Heart & Soul Project

P.O. Box 314

Polson MT 59860

Office Hours:

Tue-Thu 8:00 a.m. - 4:00 p.m.

Fridays 8:00 a.m. - Noon

Project Coordinators:

Darlis & Daniel Smith

406-250-3498

<http://www.facebook.com/PolsonHeartSoul>