

Orton Family Foundation's Planning Tools

Editor's Note: One of the roles of The Community Planner is to sort through the chaff and provide access to innovative online materials. Most of the materials are simply provided as links in the left margin of each page, but some materials and programs deserve additional comment beyond a basic link. In this issue, we introduce two new features: Product Reviews (programs worth looking at and trying out) and Site Reviews (online materials and approaches that are especially notable).

Online Resources:

[The Orton Family
Foundation](#)

It is exceedingly rare to find an approach that elicits a “this is very cool” response from the editors of *The Community Planner*. The Orton Family Foundation's Heart & Soul site is a rarity and one that we are more than happy to highlight. The philosophy behind the Heart & Soul approach is summarized on the front page of the site: “When a community takes the time to get to know itself, it gains a sense of identity and purpose that informs decisions and planning.”

Started in 2005, 10 years after the Foundation's formation, The Heart & Soul approach is based on [10 key principles](#):

- Go to, listen to, and learn from everyone;
- Do things differently;
- Discover and strengthen community values;
- Balance facts and perceptions;
- Consider all options;
- Draw connections;
- Act now and act often;
- Invest in the future;
- Be transparent and accountable; and
- Commit to the principles.

It should be noted that the Heart and Soul approach is geared towards small cities and towns., not counties or large cities. In addition, there is a significant geographic limitation, at least in terms of the Foundation's current grant program. To qualify for Foundation grants, the jurisdiction must be a municipality, must be working with at least one local or regional partner, and must be located either in one of the six New England states (Connecticut, Rhode Island, Massachusetts, Vermont, New Hampshire, and Maine) or in the upper Rockies (Colorado, Wyoming, Montana, and Idaho). The two-year Heart & Soul planning grants are awarded through a rigorous RFP (Request for Proposals) process. Despite these limitations, the site has much to offer the full spectrum of jurisdictions and geographic locations.

[Planning Tool
Exchange](#)

The Planning Tool Exchange may be the single best collection of planning tools and methods available online. The tools are listed alphabetically and each tool page offers a general description of individual planning methods, a summary of costs, and a brief benefit/limitation analysis. While the pages

**Online
Resources:**

[Heart & Soul
Community
Planning
Handbook](#)

[Implementation
Guides](#)

[CommunityViz](#)

[Big Box Evaluator](#)

do not include specific instructions, they do provide ample examples that demonstrate how each method works and how they can be used. The majority of tools are reasonably inexpensive to use and can be easily integrated into existing or ongoing planning processes. The site also provides direct access to planning and community development organizations, as well as project examples and other stand-alone resources.

Heart & Soul Community Planning Handbook. While you may be located in a jurisdiction or a geographic area that does not qualify for grants, the Heart & Soul Handbook is well worth reading. The materials are free, available as pdf files, and are written in clear, accessible language. You do not need a degree in planning to follow and understand the materials. The individual sections of the handbook provide clear instructions and explanations. In addition, the *Handbook* includes materials on implementation. Each Implementation Guide provides background materials on the topic, a list of possible goals, and a list of specific implementation steps and examples of how each step can be achieved. While the implementation guides do not yet cover the full range of planning subjects, they do focus on some of the thorniest: housing, economic development, community engagement, community character, and open government. According to the folks at the Orton Family Foundation, more Implementation Guides will be released in the coming months

CommunityViz. CommunityViz is a GIS (Geographic Information System) based planning, visualization, and analysis tool that works with ESRI's ArcGIS program. Unlike the other materials available through the Orton Family Foundation, there is a cost associated with CommunityViz (\$850, including 12 months of tech support)), as well as the costs associated with ArcGIS (ESRI). If your community or county does not use ESRI, then CommunityViz will not work with your system. That said, the cost is fairly minimal given the overall power of the program. CommunityViz provides communities and planners with a pretty broad range of tools, including scenario planning, sketch planning, 3-D visualization, suitability analysis, impact assessment, growth modeling, and more.

Editor's note: We have not tested the program, so we can not confirm whether their ease of use claim is accurate. We hope to have a longer and more detailed product review in the Winter issue (February 2012) of The Community Planner).

Big Box Evaluator. The Big Box Evaluator does exactly what the name implies: it models and evaluates the potential impacts and benefits of building a big box store in your community. Like Heart & Soul, it is limited to rural towns, suburban neighborhoods, and urban neighborhoods. The examples and the methodology can be adopted to other types of jurisdictions. It also provides planners and community leaders with a list of things to look at in evaluating the benefits/impacts of big box stores in terms of planning, the economy, the environment, the social fabric, and the visual nature of place.

This review touches on only a fraction of the materials available through the Orton Family Foundation website. You would be well advised to spend time looking at what is there. Again, while there are some limitations, most of the material can be modified to work for counties, townships, and other types of jurisdictions and the materials are accessible. At the very least, the site provides you with an excellent starting point for your planning process and with ample tools and techniques.