Relational Strategic Planning Toolkit

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March 2026

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Introduction

Strategic planning can truly make a significant difference in housing projects and their implementation. When planning is clear, collaborative, and grounded in reality, communities are better able to define goals, take action, and adjust course over time. Without it, even well-funded or well-intentioned efforts can stall, fracture, or drift.

At its core, strategic planning functions as a compass, not a contract. It helps communities prioritize housing needs while holding multiple forms of knowledge at once: quantitative data, lived experience, political realities, and local priorities. It creates a shared orientation, so people understand not only what the housing goals are, but why they matter and how progress will actually happen.

Through trial and error at MHP, we have learned that strategic planning works best when it is not treated as a one-size-fits-all process. Our approach is rooted in relational planning and takes a locally-grounded view of how information is collected, interpreted, implemented, and refined over time. We are intentional about adapting methods to fit the people, capacity, culture, and context of each community we work with.

We are also clear about this: our way is our way. There is no single “correct” approach to strategic planning. What matters most is that the process is meaningful, accessible, and usable for the people who will live with the outcomes.

To that end, we have developed activities and tools that are participatory, interactive, and designed to keep planning from becoming a passive or extractive exercise. Our belief is that strategic planning should invite engagement, surface insight, and build shared ownership—not boredom.

Housing and community development decisions shape the stability, health, and future of rural communities. Strategic planning can help ensure those decisions reflect local knowledge, shared priorities, and a commitment to long-term wellbeing.

We hope the tools and approaches in this toolkit are useful to you and your community. At the same time, we encourage you to explore other methods, frameworks, and practices, and to adapt what you find here in ways that best support your goals and relationships.

Purpose of the Toolkit

The purpose of this toolkit is to support clear, collaborative, and context-responsive strategic planning in rural housing and community development settings. It is designed to function as a practical guide—not a prescriptive formula—helping communities orient themselves, make informed choices, and move forward with shared understanding.

Grounded in a relational planning philosophy, this toolkit offers a flexible framework. It is intentionally designed to be adapted based on local capacity, culture, relationships, and political realities. Specifically, this toolkit aims to help communities and organizations create planning processes that build capacity, ownership, and trust—beyond documents or deliverables.

Strategic planning can help communities move from reacting to housing challenges toward shaping housing futures that reflect local priorities, stability, and long-term wellbeing.

This is not a one-size-fits-all model. It reflects MHP's approach, shaped through practice and learning, but it is not presented as the "right" way to do strategic planning. The goal is not perfection or uniformity; it is coherence, usefulness, and forward movement.

Overview of Rural Housing Needs

At MHP, we are rural housing experts. Through years of on-the-ground work, we know that rural housing challenges are rarely isolated or singular. Instead, they are multifaceted and deeply interconnected, shaped by long-standing patterns of policy, investment, workforce dynamics, infrastructure capacity, organizational capacity, and cultural context.

Across rural communities, common realities can include:

- Aging, substandard, or energy-inefficient housing stock
- Limited access to qualified contractors, building materials, and flexible financing tools
- Infrastructure constraints, including water, sewer, roads, and broadband
- Workforce shortages and misalignment between wages and housing costs
- Small staffs and overlapping roles within organizations and local governments
- Strong connections between housing outcomes and health, education, economic stability, and overall community wellbeing

What is critical in rural housing planning is avoiding a scarcity-based lens that treats these issues as isolated problems competing for limited resources. In practice, these challenges are interdependent. Decisions in one system—such as education, healthcare, transportation, or economic development—inevitably shape housing outcomes, and vice versa.

For this reason, MHP encourages strategic planning approaches that resist overly siloed or short-term solutions. Effective rural housing planning requires systems-aware thinking that considers how multiple agencies, sectors, and community landscapes interact. This includes examining how schools, local economies, health systems, infrastructure providers, and social services influence housing needs and opportunities.

By centering collaboration, cross-sector alignment, and multi-agency work, communities are better positioned to develop housing strategies that are realistic, resilient, and responsive to the full context in which people live.

Ultimately, the goal is not simply to produce more plans, but to support housing decisions that strengthen communities and expand opportunity over time.

Key Principles of Relational Strategic Planning

This toolkit is grounded in a set of principles that balance clarity with relationships, recognizing that strong strategy requires both.

1. Planning Is Relational

Strategy emerges through conversation, listening, and shared meaning—not just analysis. Who is involved, how they are invited in, and how decisions are made all shape the outcome.

2. **Data and Lived Experience Belong Together**
   Quantitative data provides scale and context, while lived experience provides meaning and insight. Separating the two leads to incomplete—and often ineffective—decisions.

3. **Clarity Builds Trust**
   Clear priorities, roles, and decision-making pathways reduce confusion and burnout. While ambiguity can feel flexible, it often undermines momentum and accountability.

4. **Focus Beats Exhaustion**
   Not everything can be a priority at the same time. Strategic planning requires making thoughtful choices about what matters most right now—and what can wait.

5. **Plans Should Be Usable**
   A strong plan is something people return to, reference, and act on. If a plan lives on a shelf, it is not serving the community it was created for.

6. **Capacity Is as Important as Vision**
   Ambition without capacity leads to frustration. This toolkit emphasizes aligning goals with real people, time, funding, partnerships, and systems.

Understanding the Structure of a Strategic Plan

While the process of strategic planning can and should be adaptive, most effective strategic plans share a common underlying structure. Understanding this structure helps communities see how different forms of data (quantitative, qualitative, political, and relational) fit together and inform decision-making.

Plan Anatomy

Building Blocks of a Strategic Plan

A strategic plan is a sequence of decisions that move from understanding to alignment to action to learning. →



The core components commonly found in a strategic plan and the types of data that typically inform each one are as follows:

1. Community Context and Current Conditions

Purpose:
To establish a shared understanding of where the community is starting from.

Common components include:

- Overview of the community and housing landscape
- Key trends, constraints, and opportunities
- Relevant historical and policy context

Data typically collected:

- Housing market data (supply, condition, tenure, affordability)
- Demographic and economic data
- Infrastructure capacity information
- Prior plans, assessments, and studies
- Qualitative insights about lived experience and local history

This section grounds the plan in reality and creates a common reference point for all participants.

2. Vision Statement

Purpose:
To articulate shared direction and intent.

Common components include:

- A vision or North Star statement
- Guiding values or principles
- A description of what success looks or feels like over time

Data typically collected:

- Qualitative input from community members and leaders
- Values, priorities, and non-negotiables surfaced through engagement
- Leadership insight about long-term aspirations

This section is less about technical accuracy and more about alignment and meaning.

3. Key Issues and Strategic Focus Areas

Purpose:
To identify the most critical challenges and opportunities that require attention.

Common components include:

- Priority issue areas or focus themes
- Description of why these areas matter now
- High-level problem statements grounded in context

Data typically collected:

- Synthesis of quantitative and qualitative findings
- Systems mapping or force-field analysis
- Stakeholder perspectives across sectors
- Identification of root causes rather than symptoms

This step narrows the field and prevents the plan from becoming an exhaustive wish list.

4. Goals and Desired Outcomes

Purpose:
To define what the community is working toward in concrete terms.

Common components include:

- Clear, outcome-oriented goal
- Short-, medium-, and long-term objectives

Data typically collected:

- Baseline conditions and performance metrics
- Capacity planning and readiness assessments
- Policy, resource, and implementation constraints
- Community-defined indicators of success

Goals should be ambitious but grounded in what is realistically achievable in the short and long-term.

5. Strategies and Actions

Purpose:
To translate goals into specific, actionable steps, clearly outlining what will be done, by whom, and in what order to move from vision to implementation.

Common components include:

- Strategic approaches – how the work will be approached
- Priority actions or initiatives – concrete time-bound actions that advance each strategy
- Identification and alignment of partners
- Lead and support organizations
- Key decision makers, implementers, and governance structures
- Sequencing of actions and any dependencies
- Organizational and staff capacity information

Data typically collected:

- Information about existing programs and assets
- Workforce and organizational capacity data
- Funding landscapes and timing considerations
- Political and decision-making realities

This section benefits most from clarity about roles, responsibilities, and collaboration. It provides a practical roadmap to be revisited and updated over time.

6. Implementation and Accountability Framework

Purpose:
To ensure the plan can move from paper to practice.

Common components include:

- Roles and responsibilities
- Timelines or phasing
- Decision-making and governance structures
- Monitoring and adjustment mechanisms

Data typically collected:

- Organizational and staff capacity information
- Existing reporting or tracking systems
- Partner readiness and alignment
- Feedback and learning processes

Without this section, even strong plans often stall or sit on a shelf.

7. Monitoring, Learning, and Refinement

Purpose:
To support adaptation over time.

Common components include:

- Key indicators or benchmarks
- Processes for reviewing progress
- Feedback loops for learning and course correction

Data typically collected:

- Existing reporting or tracking systems
- Ongoing monitoring and performance data
- Community feedback
- Implementation lessons and emerging conditions

This reinforces the idea that strategic planning is iterative, not static.

How to Start Strong

A relational approach to strategic planning kickoffs

A strong start creates shared orientation, trust in the process, and clarity about how decisions will be made. Through trial and error, we have found that the alternative can create confusion, misalignment, and unnecessary rework later.

At MHP, kickoff processes are more than a starting point; they are a primary data-gathering moment that sets the tone for the entire strategic planning process. The kickoff phase is when foundational information is surfaced: how people understand current conditions, where tensions and alignments exist, what constraints are real, and how different systems intersect and influence each other. This early data (including quantitative, qualitative, and relational) shapes what questions are asked next, what information still needs to be collected, and how the planning process is designed moving forward.

The goal of the kickoff is to establish a shared understanding of where the community is, what is already known, what remains unclear, and how decisions will be made. When done well, the kickoff creates a feedback loop between data, lived experience, and leadership insight that carries through the rest of the planning effort.

What Data the Kickoff Is Designed to Surface:
The Kickoff period is intentionally designed to gather multiple forms of data at once. Not all of this data is displayed in spreadsheets, but all of it influences whether a plan is realistic, aligned, and implementable.

The kickoff typically surfaces the following types of information:

1. Contextual and Historical Data

This includes information about:

- Previous planning efforts and why they did or did not move forward
- Major policy, funding, or leadership shifts that have shaped current conditions
- Community fatigue, trust levels, or past harms related to planning or development

This data helps ground the planning process in lived history rather than starting from zero.

2. Systems and Environmental Data

Kickoff conversations reveal how multiple systems are currently influencing housing outcomes, including:

- Infrastructure capacity and constraints
- Workforce availability and wage conditions
- Access to financing, development partners, and technical expertise
- Intersections with health, education, transportation, and social services

This data supports systems-aware planning and helps avoid siloed solutions.

3. Political and Decision-Making Data

Understanding how decisions are made is as important as understanding what needs to be done.

Kickoffs help clarify:

- Where authority sits and where influence flows
- Formal and informal decision pathways
- Political realities, timing constraints, and non-negotiables
- Who needs to be involved for decisions to move forward

This information is critical for designing an achievable planning and implementation pathway.

4. Capacity and Readiness Data

Kickoff activities surface realistic information about:

- Staff capacity and role overlap
- Organizational bandwidth and burnout risks
- Existing partnerships and gaps
- Readiness for implementation versus need for phased or capacity-building approaches

This data helps align ambition with what is realistically possible.

5. Values, Priorities, and Lived Experience

Qualitative insights gathered during kickoffs include:

- What community members and leaders care most about right now
- How housing challenges are experienced on the ground
- Shared values, tensions, and non-negotiables
- What success would feel like, not just look like

This information anchors strategy in meaning and community reality.

6. Relational and Alignment Data

Finally, kickoffs generate relational data that cannot be captured through surveys alone, including:

- Levels of trust, alignment, and shared language across groups
- Where perspectives diverge or overlap
- How people relate to one another across systems and roles

This data informs facilitation choices, engagement design, and sequencing throughout the planning process.

Phase 1: Pre-Kickoff Sensemaking

Pre-kickoff preparation focuses on understanding context and relationships rather than arriving with fixed answers.

This typically includes:

- A possible PESTLE or environmental scan survey
- Reviewing available data, plans, assessments, and prior engagement outputs
- Identifying known constraints related to capacity, timelines, funding, and political realities
- Mapping key stakeholders and decision-makers across systems such as housing, infrastructure, health, education, and governance
- Noting early patterns, tensions, and unanswered questions without attempting to resolve them prematurely

The goal is to arrive informed enough to ask better questions—not to pre-define priorities.

Phase 2: Framing the Work (Opening the Room)

The kickoff begins by naming reality and setting clear expectations.

This framing typically includes:

- Clarifying what the planning process is and is not
- Reinforcing that the plan will function as a compass, not a contract
- Naming known constraints alongside opportunities
- Establishing shared language for the work ahead

Clear framing reduces anxiety, prevents scope creep, and creates a shared container for participation.

Phase 3: Establishing the North Star (Shared Direction)

Rather than starting with problems, strong kickoffs begin with orientation and meaning.

This phase is designed to:

- Surface why this work matters right now
- Identify shared values, hopes, and non-negotiables
- Build early alignment without forcing consensus

A North Star or guiding statement created at this stage serves as an anchor for later decisions.

Phase 4: Mapping the System (What's Shaping the Community Landscape?)

With shared direction in place, the process shifts to understanding the systems influencing housing outcomes.

This includes:

- Exploring forces such as infrastructure, workforce, policy, funding, health, and education
- Identifying interdependencies across systems and sectors
- Surfacing assets, gaps, and tensions without rushing to solutions

This phase helps participants see beyond silos and understand how their work connects to the broader landscape.

Phase 5: Clarifying Roles and Decision Pathways

Before defining goals or actions, it is essential to clarify who is involved, how, and where decisions sit.

This phase typically addresses:

- Who holds decision-making authority
- Where collaboration is required across agencies or sectors
- Who needs to be consulted, informed, or engaged later
- What decisions require community-wide input versus leadership-level direction

Addressing this early supports realistic planning and reduces misalignment later.

Phase 6: Identifying What Comes Next (Without Overcommitting)

Kickoff visits are not meant to produce a finished plan.

Instead, this phase focuses on:

- Naming immediate next steps
- Identifying remaining gaps in information or engagement
- Confirming how findings will be shared back with the community
- Establishing how priorities and goals will be refined over time

The emphasis is on sequencing and momentum—not speed or premature precision.

Phase 7: Closing the Loop (After the Visit)

A strong start continues after the kickoff ends.

Following the visit, MHP focuses on:

- Synthesizing what was heard, observed, and surfaced
- Reflecting patterns back to the community clearly and honestly
- Confirming alignment on direction, roles, and next steps
- Adjusting the planning approach based on what emerged

TOOL 1: Reality Scan (What's Already True)

Purpose: Establish a shared baseline before opinions take over.

Worksheet: Current Conditions Reality Check

Topic	What We Know (Facts / Data)	What We Experience (Lived Reality)	Notes / Tensions
Housing stock			
Affordability			
Infrastructure			
Workforce			
Capacity			

Facilitator prompts:

- What do the numbers say?
- Where do those numbers not match lived experience?
- What feels understated or overstated?

Plan Output:

- Grounded narrative describing current housing conditions with credibility.

TOOL 2: Systems-in-the-Room Map

Purpose: Surface interdependencies shaping housing outcomes.

Circle or list systems actively affecting housing right now:

- ☐ Workforce & wages
- ☐ Education & schools
- ☐ Health & behavioral health
- ☐ Infrastructure (water, sewer, broadband, roads)
- ☐ Governance & policy
- ☐ Land & environment
- ☐ Financing & capital access

Follow-up Questions (write short answers):

- Which systems are most constraining housing?
- Which systems could become leverage points?
- Where do systems conflict or reinforce each other?

Plan Output:

Systems-aware framing (prevents siloed “housing-only” analysis).

TOOL 3: Forces and Constraints Inventory

Purpose: Name reality without killing momentum.

Worksheet: What's Helping / What's Limiting	
Supporting Forces	**Limiting Forces**

Facilitator prompts:

- What is quietly working better than expected?
- What constraints do we keep designing around?
- Which constraints are structural vs temporary?

Plan Output:

Honest assessment of feasibility and readiness.

TOOL 4: Capacity and Bandwidth Check

Purpose: Prevent fantasy planning.

Worksheet: Capacity Snapshot				
Area	**Strong**	**Stretched**	**Critical**	**Notes**
Staff Time				
Technical Expertise				
Partnerships				
Funding Admin				
Implementation Follow-Through				

Facilitator prompts:

- What breaks first when something new is added?
- Where are people already compensating?
- What cannot be asked of current staff?

Plan Output:

Capacity-informed current conditions + realistic goals later.

TOOL 5: Decision Reality Map

Purpose: Understand how decisions really happen.

Worksheet: Decision Pathways			
Decision Type	**Who Decides**	**Who Influences**	**Who Must Be on Board**
Housing Priorities			
Funding Use			
Policy Changes			
Implementation Sequencing			

Facilitator prompts:

- Where do decisions stall?
- Where does informal influence matter most?
- Who gets surprised too late?

Plan Output:

Political and governance context section (quietly essential).

TOOL 6: Known / Assumed / Missing Sort (The Anti-Survey Tool)

Purpose: Stop collecting data you don't need.

Worksheet: Data Sorting		
Known (Verified)	**Assumed (Needs Testing)**	**Missing (Must Collect)**

Facilitator prompts:

- What are we treating as fact that might not be?
- What would materially change decisions if we knew more?
- What can we not proceed without?

Plan Output:

Targeted follow-up data plan + efficient research scope.

TOOL 7: Drafting the Current Conditions Spine (Post-Kickoff)

Purpose: Turn inputs into plan language.

Worksheet: Current Conditions Outline

1. **Housing Reality (1–2 paragraphs)**
    - Stock condition
    - Affordability pressures
    - Key gaps

2. **Systems Shaping Housing (bullet synthesis)**
    - Workforce
    - Infrastructure
    - Health / education
    - Governance

3. **Capacity & Constraints**
    - Staffing
    - Partnerships
    - Timing

4. **Implications for Planning**
    - What this means for priorities
    - What must be phased
    - What must be coordinated

Plan Output:
Draft-ready Community Context & Current Conditions section.

Signature Kickoff Activities

Relational tools for surfacing system reality, capacity, and alignment.

These activities are core to MHP's kickoff approach. Each one is designed to surface specific types of data that directly inform the Community Context and Current Conditions section of the strategic plan—and later support priorities, goals, and implementation.

1. Stakeholder Body Mapping

Purpose: Understand who plays which roles in the system—and how the system actually functions.

What This Surfaces:

- Formal and informal roles across systems
- Gaps, overload, and duplication
- Where leadership, care, action, and movement are concentrated or missing

How It Works: Participants map stakeholders onto a "body" representing the housing system.

Body Parts & Prompts:

- Head (Vision & Direction): Who sets direction? Who holds authority?
- Heart (Care & Trust): Who holds relationships, history, and community trust?
- Hands (Action & Delivery): Who does the work day-to-day?
- Feet (Movement & Access): Who connects systems, moves resources, or removes barriers?
- Spine (Often Invisible): Who is carrying stress, risk, or coordination load?

Workbook Page: Stakeholder Body Map		
Body Part	**Stakeholders**	**Notes (Gaps / Overload / Risk)**
Head		
Heart		
Hands		
Feet		
Spine		

Plan Output:

- Stakeholder context
- Capacity and burnout signals
- Governance and collaboration insights

2. Force Field Analysis

Purpose: Identify what is actively supporting or resisting housing progress.

What This Surfaces:

- Structural and political constraints
- Existing momentum and assets
- Misalignment between effort and impact

How It Works: Participants identify forces currently shaping housing outcomes.

Workbook Page: Force Field Analysis	
Forces Supporting Progress	**Forces Limiting Progress**

Plan Output:

- Honest feasibility framing
- Reality-based current conditions narrative

3. Feasibility Mapping

Purpose: Separate what is important from what is currently possible—and plan accordingly.

What This Surfaces:

- Capacity limits
- Timing and sequencing needs
- Where phased approaches are required

How It Works: Ideas, needs, or potential actions are mapped across feasibility dimensions.

Workbook Page: Feasibility Map				
Item	**Technically Feasible?**	**Politically Feasible?**	**Capacity Available?**	**Notes**
	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	
	☐ Yes ☐No	☐Yes ☐No	☐Yes ☐No	
	☐ Yes ☐No	☐ Yes ☐No	☐Yes ☐No	
	☐ Yes ☐No	☐ Yes ☐No	☐Yes ☐No	
	☐ Yes ☐No	☐ Yes ☐No	☐Yes ☐No	

Facilitator Prompts:

- What would break if we did this now?
- What needs to be true for this to become feasible?
- What could be phased or piloted?

Plan Output:

- Grounded planning assumptions
- Inputs for realistic goals and sequencing

4. Systems Touchpoint Mapping

Purpose: Make interdependence visible.

What This Surfaces:

- Cross-sector connections
- Points of friction and alignment
- Opportunities for coordination

Workbook Page: Housing System Touchpoints			
System	**How It Interacts with Housing**	**Key Constraints / Opportunities**	**Notes**
Workforce			
Health			
Education			
Infrastructure			
Governance			

Plan Output:

- Systems-aware current conditions
- Justification for multi-agency collaboration

5. North Star Anchoring

Purpose: Ensure data is interpreted through shared intent.

Workbook Page: North Star Check

- In one sentence: Why does this work matter now?
- What must not be lost as we move forward?
- What would success feel like five years from now?

Plan Output:

- Orientation lens for interpreting data
- Guardrails for later prioritization

How These Activities Fit Together

Each activity feeds a specific part of the plan:

Activity	Plan Section Informed
Stakeholder Body Mapping	Capacity, governance, collaboration context
Force Field Analysis	Constraints, readiness, feasibility
Feasibility Mapping	Goals, sequencing, implementation
Systems Touchpoint Mapping	Systems context, cross-sector framing
North Star Anchoring	Vision, values, decision-making

Methods for Ensuring You Have the Information You Need for Community Context and Current Conditions

The Community Context and Current Conditions section of a strategic plan is built through intentional synthesis—bringing together quantitative data, lived experience, and systems-level understanding into a shared, credible baseline.

At MHP, the kickoff visit is central to this work. The kickoff is where foundational information is first surfaced, tested, and grounded in local context. The steps below describe how kickoff insights are translated into a clear, usable Current Conditions section.

1. Start With What the Kickoff Already Revealed

Kickoff visits surface more information than is often immediately obvious. Before collecting additional data, we begin by documenting and organizing what was already gathered through kickoff conversations, activities, and observations.

This typically includes:

- How participants describe current housing conditions in their own words
- Which issues feel most urgent versus long-standing
- Where there is alignment or tension across departments, agencies, or leadership
- What constraints are named repeatedly (capacity, infrastructure, funding, timing)
- What assets and informal strengths emerge organically

This step prevents redundant data collection and ensures the planning process builds on lived knowledge rather than overlooking it.

2. Identify What Is Known, What Is Assumed, and What Is Missing

Using kickoff insights as a starting point, we sort information into three working categories:

- Known: Information that is well-understood and broadly agreed upon
- Assumed: Beliefs or narratives that may need validation
- Missing: Data or perspectives that are clearly needed to move forward

This sorting helps shape a targeted data collection strategy rather than defaulting to broad or generic data gathering.

3. Layer in Quantitative and Technical Data Strategically

Once kickoff insights are organized, quantitative data is used to add depth, scale, and specificity, not to replace community understanding.

Common data sources may include:

- Housing stock condition and tenure
- Demographic and economic trends
- Infrastructure capacity (water, sewer, broadband, roads)
- Workforce availability and wage data
- Prior plans, studies, and assessments

Kickoff findings help determine which data points matter most and how they should be interpreted within local context.

4. Use Systems Thinking to Connect the Dots

Kickoff conversations often reveal how housing is shaped by multiple systems. This insight is intentionally carried into the Current Conditions section by organizing data around intersections.

This may include examining:

- Housing and workforce dynamics
- Housing and health outcomes
- Housing and education stability
- Infrastructure capacity and development feasibility
- Organizational capacity across agencies

Rather than listing data by sector, this approach highlights how systems interact to shape housing outcomes.

5. Reflect Political and Capacity Realities Honestly

A realistic Current Conditions section acknowledges not only what is needed, but what is feasible.

Kickoff-derived political and capacity insights are used to:

- Name decision-making structures and constraints
- Clarify staff capacity and role overlap
- Acknowledge timing, funding, and regulatory realities
- Avoid aspirational framing that is disconnected from implementation
- This builds trust and sets the stage for achievable goals later in the plan.

6. Validate Findings Before Finalizing

Before the Current Conditions section is finalized, findings are often shared back (formally or informally) with key stakeholders.

This step helps:

- Confirm accuracy
- Correct misunderstandings
- Build shared ownership of the baseline narrative
- Reinforce that the plan reflects collective understanding

Shaping Strategic Direction

Using context, insight, and shared meaning to define vision, focus, and goals

This section explains how communities move from understanding current conditions and shared values to defining strategic focus areas, goals, and desired outcomes. While the kickoff phase plays a central role in surfacing the information that informs these decisions, the methods described here apply broadly to any strategic planning process grounded in relational, systems-aware practice.

In relational planning, strategy is formed through listening, sensemaking, and alignment, using the information surfaced during early phases of the planning process (particularly the kickoff) to guide decisions about vision, priorities, and outcomes.

Understanding the North Star

When we talk about a North Star in strategic planning, we are drawing from a very literal metaphor.

Polaris (the North Star) is a fixed point in the night sky. While constellations shift with the seasons and the sky changes depending on where and when you are looking, Polaris remains constant. For centuries, it has been used for navigation because it provides a reliable point of orientation, even when everything else is in motion.

In strategic planning, the North Star serves the same function. Conditions will change. Leadership may shift. Funding cycles, political realities, and external pressures will evolve. But the North Star remains steady. It is the shared direction the organization or community is moving toward and something people can orient themselves to when decisions get difficult or tradeoffs are required.

A strong North Star provides coherence. It connects people across roles, systems, and time horizons, offering a common reference point that guides priorities, decisions, and adaptation.

In this way, the North Star is an important part of the plan that keeps an organization's actions aligned with its mission and values.

Quick Tip: Connect the North Star to Place

At MHP, we have found that some of the strongest and most enduring North Star statements are connected to place. Visions that reflect the land, history, culture, or shared identity of where an organization or community is rooted tend to feel more authentic and resonant.

Grounding a North Star in place helps anchor strategy in lived experience. It reinforces that the direction being set is not abstract or generic but deeply connected to the people and context it is meant to serve, making it easier for stakeholders to recognize themselves in the vision and stay aligned as conditions change.

Inputs that inform the Vision and North Star typically include:

- What participants consistently name as important or non-negotiable
- Shared concerns about community wellbeing, stability, and future generations
- Tensions between current realities and desired conditions
- Descriptions of what success would feel like, not just what it would produce

By grounding the Vision and North Star in lived experience and current context, communities create an orienting statement that is both meaningful and credible—one that can guide decisions when tradeoffs arise later in the process.

Identifying Strategic Focus Areas

Strategic focus areas define where attention and effort should be concentrated. The goal for these is to identify a small number of priority areas that reflect the most significant opportunities to influence outcomes. These should be narrowed down to the few areas where strategic effort is most likely to create meaningful progress. This narrowing is essential to avoiding diluted or unrealistic plans.

Focus areas are shaped by examining patterns across:

- Community context and current conditions
- Systems and interdependencies influencing housing outcomes
- Repeated constraints or leverage points identified across activities
- Areas where coordination, rather than isolated action, could create change

Quick Tip: Identifying Strategic Focus Areas

When reviewing all the kickoff data, there is a good chance that the bones of the Strategic Focus Areas are already visible. Look for the patterns in your synthesis. What can be grouped down, and what are the overarching themes? If you are feeling stuck or overwhelmed by volume, design thinking tactics can help move the group from information to insight.

In practice, this means stepping back from individual issues and asking:

- What themes keep showing up across different conversations and activities?
- Which challenges are not isolated, but systemic?
- Where would progress create ripple effects across housing, health, workforce, infrastructure, or governance?

The Strategic Focus Areas may not capture everything that matters, but they should identify where strategic attention will be most impactful, given current conditions and capacity.

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Worksheet: Identifying Strategic Focus Areas

Step 1: Surface the Patterns

Review notes, worksheets, and outputs from the kickoff phase. Individually or as a group, list recurring themes you noticed.

Prompt: What issues, constraints, or opportunities showed up more than once across different activities?

Repeating Theme / Issue	Where It Showed Up (activities, conversations)

Step 2: Group Themes into Broader Focus Areas

Some themes are symptoms of larger system challenges. Group related themes together.

Prompt: Which of these themes belong to the same underlying issue or system?

Potential Focus Area	Related Themes Grouped Here

Step 3: Stress-Test for Strategic Value

Not every focus area is strategic. Use the questions below to test whether each area rises to the level of a Strategic Focus Area.

For each proposed focus area, answer:

Focus Area	Cross-System Impact?	Within Sphere of Influence?	Requires Coordination?	Strategic? (Yes/No)
	☐Yes ☐No	☐Yes ☐No	☐Yes ☐No	
	☐Yes ☐No	☐Yes ☐No	☐Yes ☐No	

Guidance:

- If it affects only one program, it may be an action—not a focus area.
- If it affects multiple systems and requires coordination, it likely is strategic.

Step 4: Reality Check Against Capacity and Conditions

Bring feasibility into the conversation without shutting it down.

Prompt: Given current capacity and conditions, where could focused effort realistically move the needle?

Focus Area	Capacity Fit (High / Medium / Low)	Timing Considerations	Notes

Step 5: Narrow to a Strategic Set

Most plans work best with 3–5 Strategic Focus Areas.

Prompt: If we could only focus deeply on a few areas over the life of this plan, which ones would matter most?

Draft Strategic Focus Areas:	
1.	
2.	
3.	
4.	
5.	

Output of This Worksheet

By completing this worksheet, the group should have:

- A short, defensible list of Strategic Focus Areas
- Clear reasoning for why these areas were selected
- Alignment between community context, vision, and feasibility

These focus areas then become the bridge between the North Star and Goals and Desired Outcomes.

Defining Goals and Desired Outcomes

Goals and desired outcomes translate strategic direction into concrete intent. They clarify what success looks like within each focus area and set boundaries around what the plan is realistically aiming to achieve.

Information gathered earlier helps shape goals that are:

- Aligned with the Vision and Strategic Focus Areas
- Grounded in baseline conditions and capacity realities
- Sensitive to political, organizational, and timing constraints
- Oriented toward outcomes rather than activities

Moving from focus to measurable progress

Once you have identified the Strategic Focus Areas, defining goals and desired outcomes should begin to flow. This phase asks a simple but demanding question:

If everything goes well during this planning period, what will success actually look like at the end?

Start with outcomes. Outcomes describe the change you want to see—not the activities you will complete. They help clarify what progress would mean for the community, the system, or the organization within the timeframe of the plan.

It is important to be thoughtful and realistic at this stage. Strong outcomes reflect ambition, but they are grounded in current conditions, capacity, authority, and time. Not every important issue can be resolved within a single planning period, and naming what can be achieved is a critical part of strategic discipline.

Once desired outcomes are clear, goals can be shaped to support them. Goals translate outcomes into concrete commitments that guide strategy development and implementation.

At MHP, we emphasize making goals **SMART**—Specific, Measurable, Achievable, Relevant, and Time-bound. Well-constructed goals reduce ambiguity, support accountability, and make later strategy and action planning significantly more effective.

This stage of planning can be grueling. It requires narrowing, negotiating tradeoffs, and resisting the urge to overpromise. That discomfort is a signal that the work is doing what it should—moving from aspiration to decision.

Quick Tip: Start with Outcomes, Not Activities

If you find yourself listing programs, projects, or tasks, pause. Ask instead:

- What will be different if this work is successful?
- Who will experience that difference—and how?

Outcomes clarify direction. Goals then give that direction structure.

Relational Strategic Planning Toolkit

Worksheet: From Strategic Focus Areas to Goals and Desired Outcomes

Step 1: Define Desired Outcomes

For each Strategic Focus Area, describe what success would look like by the end of the planning period.

Prompt: If this focus area is addressed effectively, what will be true that is not true today?

Strategic Focus Area	Desired Outcomes (End of Planning Period)

Step 2: Reality-Check Outcomes

Use this step to ground outcomes in feasibility.

Prompt: Given current conditions and capacity, which outcomes are realistic within this planning period?

Outcome	Within Our Influence?	Feasible in Timeframe?	Notes
	☐ Yes ☐ No	☐ Yes ☐ No	
	☐ Yes ☐ No	☐ Yes ☐ No	

Outcomes that fall outside the planning period can be acknowledged as longer-term aspirations rather than immediate goals.

Step 3: Shape Goals to Support Outcomes

For each desired outcome, draft 1–3 goals that would move the system in that direction.

Prompt: What commitments or results must be achieved to make this outcome possible?

Desired Outcome	Draft Goal

Step 4: Make Goals SMART

Refine each goal using the SMART framework.

Goal	Specific	Measurable	Achievable	Relevant	Time-Bound	Needs Refinement?
	☐	☐	☐	☐	☐	☐ Yes ☐ No
	☐	☐	☐	☐	☐	☐ Yes ☐ No
	☐	☐	☐	☐	☐	☐ Yes ☐ No

This step often requires multiple iterations, and that's normal.

Step 5: Narrow and Prioritize

Most plans benefit from restraint. Focus on the goals that will create the most meaningful progress.

Prompt: If capacity or conditions shift, which goals are essential—and which could be phased?

Final Draft Goals (by Focus Area):	
1.	
2.	
3.	

When the Process Gets Stuck (Which It Often Does)

This phase can feel slow, tense, or circular, especially when goals touch multiple systems or require coordination across agencies. When momentum stalls, AI tools can help unstick thinking, not replace judgment.

Example AI Prompts (ChatGPT or Claude)

To clarify outcomes:

- "Based on this strategic focus area and community context, generate 3–5 realistic desired outcomes that could be achieved within a 3–5 year planning period."

To draft SMART goals:

- "Turn this desired outcome into 2–3 SMART goals that reflect capacity constraints and political realities."

To refine language:

- "Rewrite this goal to be more specific and measurable without increasing scope."

To stress-test feasibility:

- "Identify potential risks or capacity constraints that could make this goal unrealistic."

Important: AI Is a Drafting Partner, Not a Decision-Maker

AI-generated goals should always be treated as starting points. Once drafted, goals should be reviewed and refined collaboratively with the core planning team to ensure they:

- Reflect lived reality
- Align with authority and capacity
- Use language that resonates locally
- Maintain accountability without overreach

This collaborative refinement is where trust, ownership, and alignment are built.

What This Phase Produces

By intentionally shaping strategic direction through this progression, communities can move forward with:

- A Vision and North Star that reflect shared meaning and reality
- A focused set of strategic priorities grounded in systems thinking
- Goals and outcomes that stretch ambition without disconnecting from feasibility

This creates a strong foundation for developing strategies, actions, and implementation plans that are aligned, realistic, and supported by the people responsible for carrying them out.

Defining Strategies and Actions

Once goals and desired outcomes are clear, the next question becomes practical and unavoidable:

How do we actually get there?

Strategies describe the approach you will take to achieve your goals. Actions describe the specific steps required to carry those strategies forward. Together, they translate commitment into movement.

At MHP, we approach strategies and actions as a process of intentional alignment connecting goals to feasible pathways forward, rather than listing everything that could be done.

Start with Strategy, Not Tasks

Before identifying actions, step back and define your strategies. Strategies answer the question:

- What approach will we take to move this goal forward, given our context and constraints?

Examples of strategies (not actions) might include:

- Strengthening cross-agency coordination around housing development
- Building internal capacity before launching new programs
- Leveraging partnerships to fill technical or staffing gaps
- Sequencing development efforts to align with infrastructure readiness

Strategies create coherence. Actions give them traction.

Be Honest About Gaps

This phase benefits from explicitly naming what is missing—not as a failure, but as planning intelligence.

Gap analysis helps clarify:

- What is needed to achieve a goal
- What already exists
- What must be built, secured, or changed

This prevents strategy from drifting into wish lists and helps prioritize actions that are foundational, not just visible.

Step 1: Identify Strategic Approaches

For each goal, define 1–3 strategies that reflect how progress will be made.

Prompt: Given our current conditions, what approaches would most effectively move this goal forward?

Goal	Strategy (Approach)	Why This Strategy Fits Our Context

Step 2: Identify Gaps That Affect Implementation

What's needed vs. what exists

Prompt: Use this worksheet to understand what must change for strategies to succeed.

Area	What's Needed	What Exists Today	Gap	Notes
Staffing / capacity				
Technical expertise				
Partnerships				
Funding / financing				
Policy / authority				
Data / systems				

Facilitator prompts:

- What assumptions are we making about capacity?
- What has to be true for this strategy to work?
- Which gaps are addressable within the planning period

Step 3: Identify Actions

Actions should be specific, sequenced, and assignable.

Prompt: What concrete steps are required to advance this strategy?

Strategy	Action	Lead	Partners	Timing

Step 4: Stress-Test Actions

Before finalizing actions, test them against reality.

Action	Feasible with Current Capacity?	Requires New Resources?	Risk Level (Low/ Med/High)	Notes
	☐ Yes ☐ Partial ☐ No	☐ Yes ☐ No		
	☐ Yes ☐ Partial ☐ No	☐ Yes ☐ No		

Actions that are not feasible should be phased, reframed, or parked—without shame.

Step 5: Prioritize and Sequence

Not all actions can happen at once.

Which actions are foundational, and which depend on earlier steps?

Near-Term Actions (0–12 months):
Mid-Term Actions (1–3 years):
Longer-Term Actions (as conditions allow):

The Ins and Outs of Implementing Strategy

How the plan moves from paper to practice

This section explains how communities move from defined strategies and goals to implementation that is clear, coordinated, and accountable. While earlier phases of the planning process focus on shaping direction and intent, this phase is about creating the conditions for follow-through—clarifying ownership, sequencing work realistically, and embedding accountability into existing systems and relationships.

In relational planning, implementation is not treated as a handoff or an afterthought. It is shaped through the same listening, sensemaking, and alignment that guided earlier decisions, using the information surfaced during kickoff and strategy development to determine who is best positioned to lead, what is feasible within current capacity, and how progress will be tracked and adjusted over time.

Rather than relying on rigid enforcement or standalone reporting structures, this approach emphasizes clarity, shared responsibility, and learning so the plan can move from paper to practice without losing momentum or trust.

Start with Ownership and Roles

Every action in the plan should have a clear owner. Ownership does not always mean doing the work directly—it often means coordinating partners, removing barriers, or ensuring follow-through.

Clear roles help:

- Prevent diffusion of responsibility
- Reduce burnout caused by unspoken expectations
- Make collaboration visible and manageable

Step 1: Assign Ownership

For each priority action, identify who is responsible and who is involved.

Prompt: Who is accountable for moving this forward, even if others are involved?

Action	Lead Owner	Supporting Partners	Decision Authority

Step 2: Clarify Accountability

Accountability works best when expectations are explicit.

Action	What Does "Done" Mean?	How Will Progress Be Reported?

Establish Realistic Timelines

Timelines should reflect capacity and sequencing—not optimism.

Worksheet: Implementation Timeline

Prompt: What has to happen before this can begin?

Action	Start Window	Milestone Check	Target Completion

Relational Strategic Planning Toolkit

Worksheet: Governance and Decision Pathways

Use Governance Structures You Already Have

Rather than creating new committees, implementation should leverage existing governance and meeting structures whenever possible.

This includes:

- Standing committees
- Leadership or council meetings
- Inter-agency working groups

Implementation works best when it is embedded into existing rhythms of decision-making.

Action Area	Existing Forum	Decision Point	Notes

Accountability

Prompt: What would tell us early that this is off track?

Goal	Key Indicator(s)	Check-In Frequency	Responsible Party

Build in Reflection and Adjustment

No plan unfolds exactly as expected. Accountability includes creating space to pause, reflect, and adapt.

This might include:

- Annual or semi-annual plan reviews
- Quick reflection sessions after major milestones
- Adjustments to actions based on new information

Adaptation is a sign of responsiveness, not failure.

When Accountability Gets Hard

Implementation often surfaces:

- Capacity strain
- Shifting priorities
- Leadership or staff turnover

When this happens, the goal is not to assign blame, but to return to clarity:

- Is the action still relevant?
- Is the ownership still appropriate?
- Does the timeline still make sense?

Revisiting these questions keeps the plan alive.

Monitoring, Learning, and Adapting: The key to making sure that plans thrive

A Lean-informed approach

Monitoring and accountability are most effective when they support learning and adjustment, rather than compliance for its own sake. In this toolkit, we draw lightly from Lean process improvement principles to help communities stay focused on progress, reduce friction, and adapt as conditions change.

At its core, Lean emphasizes making work visible, testing assumptions early, and improving through small, continuous adjustments. Applied to strategic planning, this means treating implementation as an iterative process, not a fixed sequence.

Rather than asking “Did we complete everything exactly as planned?”, this approach asks:

- What did we try?
- What did we learn?
- What should we adjust next?

This mindset allows teams to respond to real-world constraints without abandoning strategic direction.

Lean Practices That Support Strategic Implementation

The following Lean-inspired practices can be incorporated into monitoring and learning without adding unnecessary burden:

Short Feedback Loops
Instead of waiting for annual reviews, build in regular, lightweight check-ins to assess progress and surface barriers early. This helps teams correct course before issues compound.

Focus on Flow, Not Just Outputs
Pay attention to where work slows down, stalls, or gets stuck. Bottlenecks often signal capacity gaps, unclear ownership, or misaligned decision pathways, valuable information for adaptation.

Small Tests Before Full Commitments
When possible, pilot actions or test approaches on a small scale before expanding. This reduces risk and builds confidence based on real results rather than assumptions.

Clear Signals for Adjustment
Identify simple indicators that show when an action is off track or needs revision. These signals help normalize adjustment as part of the process, not as a failure.

Reflection as a Structured Practice

Lean-informed reflection is brief, focused, and actionable. Rather than open-ended discussion, reflection sessions can center on a few consistent questions:

- What worked better than expected?
- What didn't work, and why?
- Do we need to make adjustments? If so, what is one adjustment we should make next?

These reflections can be integrated into existing meetings or reporting rhythms to avoid creating new structures.

Why This Matters

By incorporating Lean principles into monitoring and learning, communities are better equipped to:

- Reduce wasted effort
- Respond to capacity constraints in real time
- Maintain momentum during long planning horizons
- Adapt strategies without losing alignment

This approach reinforces that accountability is not about rigid adherence to a plan, but about staying oriented toward the North Star while improving how the work gets done.

By the end of this phase, communities should have:

- Clear ownership and roles for actions
- Realistic timelines tied to capacity
- Embedded accountability within existing structures
- A monitoring approach that supports learning and adaptation

Closing: Staying Oriented as the Work Continues

Strategic planning works when people have shared understanding, clear direction, and enough trust to keep moving as conditions change. This toolkit is designed to support that kind of work—planning that is structured without being rigid, relational without being vague, and grounded in the realities communities are navigating every day.

The approaches outlined here are meant to help teams hold multiple forms of knowledge at once: data, lived experience, system constraints, and local priorities. When those inputs are brought together with care, strategy becomes easier to shape, decisions become clearer, and follow-through becomes more realistic.

The North Star plays a central role in this process. It offers a steady point of orientation as strategies, actions, and timelines evolve. When direction is shared and rooted in place and values, adaptation becomes part of the work rather than a disruption to it.

Housing and community development planning unfolds over time, through relationships and real-world conditions that rarely stay static. Plans that remain useful are those that can be revisited, adjusted, and strengthened as learning continues. Our hope is that this toolkit supports planning processes that feel grounded, achievable, and connected to the people and places they are meant to serve.

Use what is helpful here. Adapt what needs shaping. And carry forward what supports clarity, alignment, and steady progress.