

Strategic Plan

2025-2030

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EXECUTIVE SUMMARY

The Smarter Balanced Assessment Consortium is committed to delivering high-quality assessments and resources that support students, families, teachers, administrators, and policymakers. This five-year Smarter Balanced Strategic Plan provides a roadmap for innovation, growth, and efficient operations, ensuring Smarter Balanced remains a leader in educational assessment while responding to evolving member needs and policy shifts.

Vision and Mission

Smarter Balanced envisions an education system in which every teacher has the tools and knowledge to empower all students who take Smarter Balanced assessments to graduate high school ready to pursue meaningful opportunities. Assessments play a vital role in:

- Identifying student needs and strengths
- Communicating and monitoring progress over time
- Informing teaching to help all students who take the assessments engage with challenging content

By delivering usable, high-quality data, Smarter Balanced empowers teachers to align teaching to each student's needs and support learning growth.


A Member-Driven Approach

Unlike traditional vendor-driven assessments, Smarter Balanced operates as a collaborative consortium, working closely with members to develop rigorous, flexible, innovative solutions that prioritize student learning. Smarter Balanced provides common assessment services and teaching resources to members while also offering customized solutions to address the unique needs of states and territories.

Strategic Focus for the Next Five Years

In a rapidly changing education landscape, Smarter Balanced stays committed to continuous improvement, adapting to member needs while maintaining high standards. This Strategic Plan contains the actions Smarter Balanced will prioritize to increase the value and use of the system for the next five years:

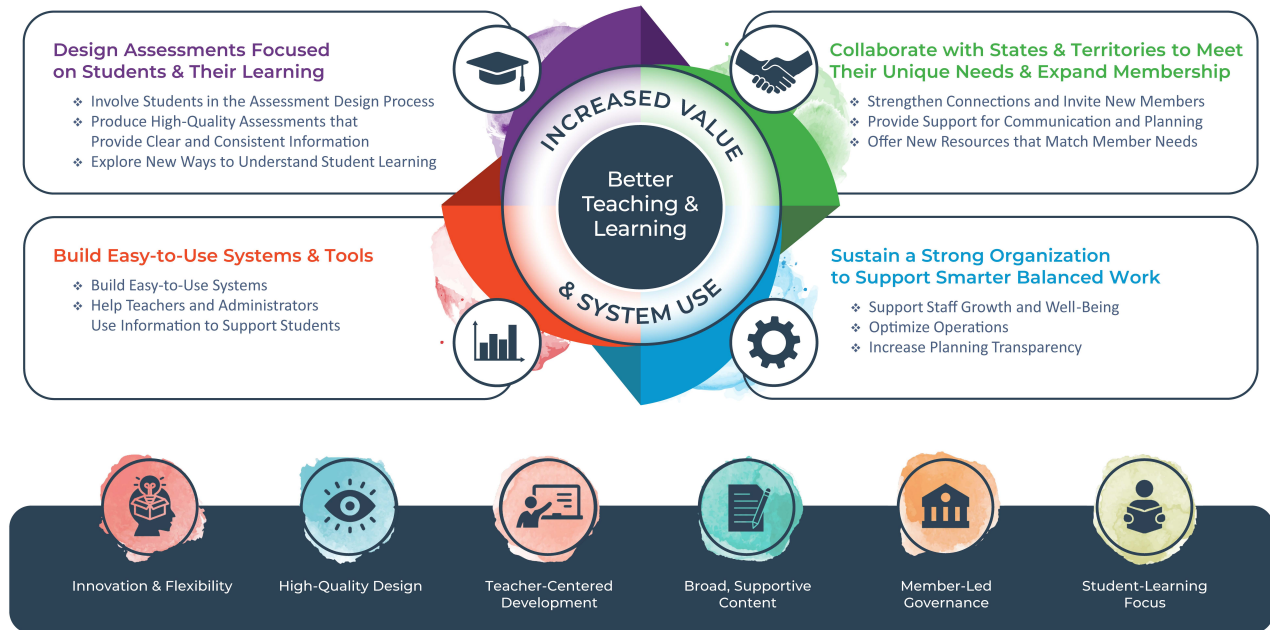
- Design Assessments Focused on Students and Their Learning
- Build Easy-to-Use Systems and Tools
- Collaborate with States and Territories to Meet Their Unique Needs and Expand Membership
- Sustain a Strong Organization to Support Smarter Balanced Work



Mission: Smarter Balanced builds and implements a dynamic system of tools for teaching and learning success.

Vision: To empower instruction that prepares all students for successful futures.

Strategic Plan Theory of Action



Adapting to Policy Shifts

This plan serves as a foundation for future decision-making, grounded in the Smarter Balanced history of success and shaped by interest holder input. Over the course of the plan, Smarter Balanced will continue to adjust in response to new policies and market shifts so that these priorities and strategies still meet the needs of students, families, teachers, administrators, and policymakers.

What Smarter Balanced Stands For

- **High-Quality Products:** Smarter Balanced creates assessments and tools that are high-quality, accurate, and matched to educational standards.
- **Continuous Improvement:** Smarter Balanced is committed to evolving tools, processes, and strategies to meet the changing needs of students and teachers.
- **Student and Teacher Success:** Smarter Balanced data and resources are designed to inform teaching and learning.

Through collaboration and innovation, Smarter Balanced is shaping education's future by creating a dynamic system of tools that enhance teaching and learning success.

LEADING ASSESSMENT INNOVATION

The Smarter Balanced Assessment Consortium is a leader in assessment innovation, providing a comprehensive and coherent system that supports student learning. By combining adaptive technology, robust accessibility features, and research-based design, Smarter Balanced removes barriers to better allow every student who takes the assessments to show what they know and can do. With a focus on continuous improvement and responding to student needs, Smarter Balanced sets the standard for modern assessments, helping students succeed in a rapidly changing world.

Unique among assessment systems, Smarter Balanced:

Is Built by Teachers, for Teachers

- Creates assessments developed with input from more than 5,000 teachers to match classroom learning
- Designs teacher-created resources that turn assessment data into practical insights for better teaching

Provides Supports for All Learners

- Includes more than 60 tools, such as text-to-speech, braille, American Sign Language videos, and translated glossaries, to provide access so that all students who take the assessments have a fair opportunity to show what they know and can do
- Provides assessments that support all learners and builds on their existing knowledge and skills

Delivers High-Quality, Adaptive Testing

- Uses computer adaptive technology and performance tasks to challenge students to think critically and apply what they know to real-world situations
- Adjusts the difficulty of questions based on student responses to more accurately measure a wide range of skills in less time

Integrates with Classroom Instruction

- Connects daily classroom assessments to end-of-year assessments with shared question banks, scoring rubrics, and sample student performance task answers
- Provides immediate feedback on student progress so teachers can scaffold learning based on where students are and adjust teaching in real time
- Offers a large digital collection of lesson plans, professional learning resources, sample questions, and practice tests that support the same goals as summative assessments

Offers Cost Sharing and Collaborative Governance

- Operates a collaborative cost-sharing model, enabling states and territories to share best practices, assessment items, instructional resources, and communications strategies
- Maintains a transparent governance structure designed to align policies, budgets, and resources with student, teacher, and administrator needs

A Legacy of Innovation and Impact

Founded in 2010, Smarter Balanced has led the way in developing innovative assessments and teaching tools that support students, families, teachers, administrators, and policymakers. First launched as a grant-funded project, Smarter Balanced has since evolved into a member-led organization with a clear mission: to build and implement a dynamic system of tools for teaching and learning success.

Smarter Balanced now offers a fully integrated system designed to measure and guide student growth that includes assessments, tools, and resources to support teaching, learning, and educational systems.

Tools and Resources

Smarter Balanced provides tools and resources to support teaching and learning and to strengthen local, state-, and territory-wide systems. Some resources are designed to support only one of these purposes, and some are designed to support both purposes. The following is a non-exhaustive set of examples of each purpose.

SUPPORTING TEACHING AND LEARNING

- **Interim Assessments:** These optional, flexible assessments for use in grades 3-8 and high school enable teachers to check student progress throughout the year and provide instructional next steps through Tools for Teachers.
- **Tools for Teachers:** This easy-to-use website offers teacher-created lessons and activities to enhance instruction and save time for teachers.
- **Content Explorer:** This user-friendly tool helps teachers understand learning standards and how assessments measure student progress.
- **Summative Assessments:** Teachers can use these (individually or in a professional learning community) as a starting point to consider how to adjust teaching for the following year.

ENHANCING SYSTEMS

- **Summative Assessments:** Computer adaptive tests include online assessments that adjust difficulty level based on student answers and performance tasks that let students show critical thinking skills such as organization, analysis, and problem-solving. These are given at the end of the year and provide an accurate and consistent description of student learning that supports teachers, administrators, and policymakers in identifying strengths and gaps in the education system to inform improvements, resource allocation, and educational policy.

- **Applications for Increasing Transparency and Understanding:** Smarter Balanced provides detailed information about the assessment system through additional web-based tools. These include a website with a full set of released performance tasks to show what types of things students are asked to do during an assessment, an online set of student work that is annotated to show the types of student work that display strong understanding, and a detailed description of performance task and assessment specifications.
- **Starting Smarter:** This tool equips families with resources to understand their students' scores and strengthen school-family connections.

Founding Purpose and Key Achievements

Smarter Balanced was built on a strong partnership with member states and territories to support student learning. Between 2010 and 2016, the Consortium worked with thousands of teachers to shift U.S. K-12 assessments from basic testing to high-quality, standards-aligned assessments that emphasize critical thinking and problem-solving.

Smarter Balanced engaged more than 5,000 teachers to develop assessment materials and teaching resources. In 2014, more than 4 million students took part in field testing to fine-tune the system before the first full launch. By 2015, Smarter Balanced successfully introduced the computer adaptive summative assessment, with more than 7 million students using it in the first year — marking a major step forward in education.

In 2015, nearly 200 colleges and universities started using Smarter Balanced scores to place students into appropriate courses, proving the system's usefulness for measuring college readiness. By 2016, independent studies confirmed the system's high standards, solidifying Smarter Balanced as a leader in innovative assessment design.

Smarter Balanced continued to grow and lead in educational assessment. The Consortium launched the first strategic plan in 2017 to further enhance assessments and adapt to member needs. In 2018, South Dakota and Nevada became the first two states to pass federal peer review using the assessments, demonstrating the assessments had fully met federal requirements for English language arts and mathematics in grades 3-8 and high school. Since then, Smarter Balanced has helped states meet peer review requirements for fully meeting critical elements.

THE FIRST STRATEGIC PLAN: BUILDING A STRONG FOUNDATION

In 2017, Smarter Balanced launched the first strategic plan, focused on five goal areas:

- **Maintaining and continually improving** a high-quality, robust system of assessments
- Providing students, families, teachers, administrators, and policymakers with **practical information** on student performance and the tools and resources to support teaching
- Strengthening the ability of Smarter Balanced to support member-led efforts to **communicate and advocate** for the value of the balanced assessment system
- Ensuring **internal capacity and leadership** remained responsive to members' evolving assessment needs and to market dynamics
- Maintaining the position of Smarter Balanced as a **leader in innovative assessment design**

Since then, the Consortium succeeded in expanding and enhancing assessments and accessibility features, providing clearer student performance data, and making tools and resources easier to use. The organization also built strong partnerships with states and territories, collaborated with industry experts, and maintained steady leadership through challenges like the COVID-19 pandemic. These achievements set the stage for ongoing growth and innovation, ensuring Smarter Balanced remains a trusted partner in supporting student learning and success.

Outcomes from the Prior Strategic Plan

The previous strategic plan led to key achievements that strengthened the impact of Smarter Balanced and set the stage for future growth.

1. Assessment Quality and Accessibility

- Expanded to include 60 advanced accessibility supports and accommodations including braille, American Sign Language videos, and translated glossaries in 13 languages, increasing fair access for all students who take the assessments
- Conducted thorough quality reviews of summative and interim performance tasks, put new quality processes in place, and ran bias and sensitivity audits

2. Interim Assessments and Instructional Tools

- Developed new and focused Interim Assessment Blocks (IABs and FIABs) for classroom use, giving teachers detailed insights to better support student learning
- Replaced the Digital Library with Tools for Teachers, streamlining access to classroom-ready resources and training materials and expanding the lesson plans
- Developed resources on Tools for Teachers and Interim Connections Playlists for all IABs and FIABs to provide a next step based on interim assessment results
- Launched a remote teaching and learning website during the COVID-19 pandemic to provide essential support and resources for teachers adapting to remote teaching

3. Reporting and Data Use

- Enhanced reports with refined math Range Level Achievement Descriptors (RALDs) and new tools that let teachers view assessment performance tasks and student responses
- Supported teachers with reporting to make data-informed decisions and enhance student outcomes
- Conducted significant, member-led revision of support materials to better align with teacher needs and classroom practice
- Expanded guides for understanding assessment results and launched Starting Smarter to help families make sense of their students' scores

4. Support for Members and Strengthening Partnerships

- Delivered customized state and territory assessments to better fit local needs
- Forged new partnerships connecting assessment results to college readiness, expanding future opportunities for students

5. Professional Learning and Collaboration

- Offered training sessions, workshops, and collaboration opportunities for teachers to share best practices
- Researched how to provide professional learning to help teachers align interim assessments with their curriculum and to use the data from interim assessments to enhance their instruction
- Developed new resources within Tools for Teachers to directly support classroom instruction

6. Organizational Capacity and Governance

- Strengthened infrastructure through fiscal agent transitions, refined branding, and deeper engagement with member Chief State School Officers and the Executive Committee
- Invested in research to maintain leadership in innovative assessment design and educational excellence
- Established a member-endorsed membership fee structure change and price reduction
- Adjusted the governance fee structure to support states and territories during the COVID-19 pandemic

As Smarter Balanced moves forward, the Consortium builds on this strong foundation to continue delivering innovative, accessible, and high-quality assessments and resources.

Principles of High-Achieving Education Systems

Smarter Balanced assessments are guided by a set of seven core principles shared by high-achieving education systems worldwide. These principles are the center of the Smarter Balanced Theory of Action and provide the foundation for high-quality, accurate, and fair assessments that measure deep content understanding and advanced thinking skills essential for success in a global, knowledge-based economy.

The Seven Core Principles

1

Assessments are grounded in a thoughtful, standards-based curriculum and are managed as part of an integrated system.

2

Assessments produce evidence of student performance.

3

Teachers are integrally involved in the development and scoring of assessments.

4

Assessment system development and implementation is a member-led effort with a transparent governance structure.

5

Assessments are structured to continuously improve teaching and learning.

6

Assessment, reporting, and accountability systems provide useful information on multiple measures that is educative for all interest holders.

7

Design and implementation strategies adhere to established professional standards.

Smarter Balanced High Quality of Education Systems

These principles also inform how Smarter Balanced develops research-backed classroom tools, incorporating a balanced set of technology-enabled resources, innovative assessments, and high-quality teaching supports. By adhering to these principles, Smarter Balanced continues to evolve assessments and resources to meet the needs of students, teachers, administrators, and policymakers, supporting excellence in education.

DEVELOPING THE NEW STRATEGIC PLAN

The 2025-2030 Smarter Balanced Strategic Plan builds on a legacy of excellence, innovation, and access for students, ensuring that the Consortium continues to provide high-quality, research-based assessments that support teachers, administrators, students, and their support networks. This plan prioritizes innovation, fair access, and data-driven tools to enhance learning and support student outcomes while helping Smarter Balanced keep pace with the evolving educational landscape. Smarter Balanced remains committed to attracting and retaining top assessment experts and fostering a culture of excellence that adapts to the needs of members and the broader education community.

Participatory and Research-Driven Approach

Developing this Strategic Plan was a collaborative process with several feedback and revision rounds that included internal insights, external expertise, and extensive engagement with interest holders. The process began with internal work to draft a framework, informed by:

- Teacher focus groups
- Surveys and discussions with members
- Smarter Balanced staff engagement
- Input from the Technical Advisory Committee (TAC)
- A review of historical documents and past strategic outcomes

As the plan evolved, Smarter Balanced identified the importance of amplifying student voices in the development process. To strengthen this aspect, Marzano Research, an external strategic planning facilitator, was engaged to guide the process.

The facilitator conducted a deep content analysis of prior work, assessed the outcomes of the previous strategic plan, and facilitated discussions with Smarter Balanced staff, TAC members, and members. These efforts led to the identification of the four priority areas that anchor this plan.

The Smarter Balanced strategic planning process has directly integrated voices and viewpoints from interest holders — member educational agency staff; teachers; the TAC; national policy organizations; assessment experts; Consortium staff; policymakers; and, for the first time, students themselves — to shape the future of assessments. Over two years, more than 100 representatives of these interest holder groups contributed insights that resulted in a roadmap to address future challenges and opportunities.

Strategic Plan CREATION OVERVIEW



Prior Smarter Balanced Data

- Teacher Focus Groups
- Surveys:
K-12 Leads, Higher Education Leads, TAC
- Sensemaking Sessions: SB Staff, ELT
- Historical Documents
- Prior Strategic Plan Draft



Preliminary Marzano Research Work

- Interviews with Leadership
- Collaboration Conference Focus Group



HIGH-LEVEL PRIORITY AREAS & CORE STRENGTHS



Deep Interest Holder Engagement

- Listening Sessions and Focus Groups with Chiefs
- Student Engagement Sessions
- Semi-structured Interviews with National Policy Organizations and TAC Members
- Conversations with K-12 Leads
- Staff Focus Groups and Feedback Survey



INFORM/REFINE Strategic Plan & CREATE Goals/Strategies

Interest Holder Engagement Process

Smarter Balanced conducted several engagement sessions to gather insights and inform plan development. These sessions included a broad range of perspectives that helped shape the final priorities.

- **State and Territory Chief State School Officer Sessions** – Discussions with member states and territories focused on policy shifts, assessment alignment, and communication strategies
- **National Organization Sessions** – Interviews with assessment experts and policymakers to gather insights on national policy trends and evolving assessment needs
- **Student Engagement Sessions** – Virtual discussions with elementary, middle, and high school students from member states and territories to incorporate their viewpoints on assessment design, fairness, and ease of use
- **Smarter Balanced Staff Engagement Sessions** – Internal discussions to refine strategies, address challenges, and align resources with long-term goals

Key themes that emerged from these sessions included:

- Strengthening communication to help interest holders understand the value of and connection between all parts of the comprehensive system
- Expanding early literacy and high school assessment options
- Developing communication and messaging to increase interest holder understanding of assessment results
- Enhancing personalization and student engagement in the assessment process without losing rigor or quality
- Addressing political and policy challenges affecting state and territory assessments

These insights directly shaped the four priority areas outlined in this Strategic Plan, ensuring that Smarter Balanced remains responsive to the evolving needs of members and the broader education community.

LOOKING AHEAD: THE NEXT FIVE YEARS

This Strategic Plan comes at a pivotal time for Smarter Balanced Assessment Consortium members. As education systems evolve, states and territories are adopting different approaches to standards and assessments, creating both opportunities and challenges. Smarter Balanced must balance the benefits of a large-scale system while also adapting to local priorities.

At the same time, teachers, administrators, and assessment systems face new pressures, including:

- ▶ Changing education policies at the federal and local levels
- ▶ Declining student enrollment in many areas
- ▶ Accelerating learning with targeted solutions
- ▶ Varying levels of student readiness, requiring enhanced learning support

This Strategic Plan provides a clear roadmap for the future, combining flexibility and innovation with the power of collaboration. It describes how staff, resources, and initiatives will continue to support the evolving needs of members while staying true to the Smarter Balanced vision: empower instruction that prepares all students for successful futures.

Priority Focus

With a strong foundation in place, Smarter Balanced is moving into a new phase of strategic growth focused on four key priorities, each firmly rooted in the seven principles of high achieving education systems Smarter Balanced was built upon:

Design Assessments Focused on Students and Their Learning (in support of principles 2, 6)

Smarter Balanced will continue to develop high-quality assessments with content that is relevant and engaging for students. Students will have chances to give input on assessment design, topics of student interest, and their experience. In addition, Smarter Balanced will make assessment system data easy to find and understand, helping students and their support networks make informed decisions about improving student learning.

Build Easy-to-Use Systems and Tools (in support of principles 1, 3, 5)

Smarter Balanced will make assessments, resources, and online systems streamlined and user friendly to support classroom teachers. Teachers will play a central role in designing and refining these resources so that they align with teaching needs. Smarter Balanced will prioritize training and professional development to help teachers maximize the value of assessment data in their teaching.

Collaborate with States and Territories to Meet Their Unique Needs and Expand Membership (in support of principle 4)

Smarter Balanced will strengthen relationships with members by providing tailored solutions. The Consortium will also work to expand membership through flexible service models and clear communication of system value. By evolving member-led decision-making and fostering strategic partnerships, Smarter Balanced will help members navigate policy shifts and maintain high-quality assessment systems.

Sustain a Strong Organization to Support Smarter Balanced Work (in support of principle 7)

Smarter Balanced will continue to refine internal processes; invest in staff development; promote a culture of purpose and well-being; and prioritize innovation to maintain efficiency, reliability, and adaptability. By focusing on attracting and retaining top talent, Smarter Balanced will be positioned to remain a leader in assessment design and implementation.

By advancing these priorities, Smarter Balanced will help families, teachers, administrators, and policymakers achieve better outcomes for students, ensuring that assessments provide meaningful insights that inform teaching and support student success.

STRATEGIC PLAN PURPOSE

This Strategic Plan serves as a roadmap for Smarter Balanced interest holders, including K-12 agencies and higher education institutions, ensuring that:

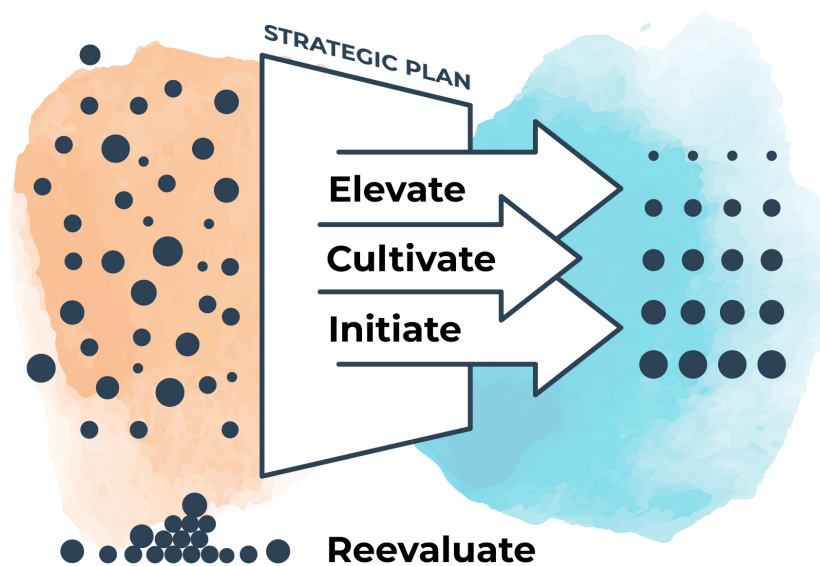
- Smarter Balanced prioritizes products and services that provide the greatest value to members.
- Members can effectively communicate changes and innovations to their interest holders.

Who Will Use the Plan and How

- **Consortium members** will use the plan to guide their decision-making as they allocate the Consortium's resources toward the products and services that provide the greatest value to their students, families, teachers, administrators, and policymakers.
- **Smarter Balanced staff** will use the plan to guide strategic and operational planning, including resource allocation, project prioritization, hiring, budgeting, and professional development.

This plan invites staff and members to:

- **Elevate** work Smarter Balanced has been doing that can be enhanced: more focus, collaboration, and innovation to strengthen value for students, teachers, and administrators
- **Cultivate** the foundational practices that are already working: core efforts that remain essential to supporting students, teachers, and administrators, even if they aren't called out explicitly in the plan
- **Initiate** new efforts that deepen connections with teachers and respond to emerging needs, opportunities, or challenges: bold ideas related to where education is heading next
- **Reevaluate** work that no longer aligns with the strategic purpose of Smarter Balanced: programs, practices, or investments that may have served the Consortium once, but no longer support where the Consortium is going



This plan doesn't capture everything Smarter Balanced does; nor should it. Rather, it provides a shared lens for deciding what work moves forward and why. It is here to help the Consortium stay focused, nimble, and purpose-driven.

By aligning members and staff around shared priorities, strategies, and goals, this plan strengthens the Consortium's ability to provide students with the skills and opportunities they need to succeed in a rapidly changing world.

CORE STRENGTHS: A FOUNDATION FOR FUTURE GROWTH

To develop this Strategic Plan, Smarter Balanced engaged with key interest holders to reaffirm the Consortium's core areas of excellence and identify strengths central to the value Smarter Balanced delivers. These strengths continue to guide the Smarter Balanced strategic direction.



Innovative and Flexible Systems

- Be responsive to the evolving needs of members
- Engage in research-driven approaches to assessment innovation that enhance teaching and learning

Commitment to High-Quality Design and Deliverables

- Meet the highest quality standards for assessments and resources
- Evolve to continue to meet the needs of students, families, teachers, administrators, and members

Teacher-Centered Development

- Leverage teacher expertise in the design and development of assessment tools
- Align resources with real classroom experiences and teaching needs

Engaging and Supportive Content

- Develop assessments that allow all students who take the assessments to show what they know and can do
- Maintain the status of Smarter Balanced as a leader in designing fair and accessible assessments

Member-Led Governance and Collaboration

- Support a governance structure that enables the Consortium to respond to the evolving needs of members
- Engage in partnerships that align with member education priorities and goals

Student-Learning Focus

- Provide actionable insights to students, families, teachers, and administrators to support learning
- Prioritize student learning experiences and outcomes when considering changes to the assessment system

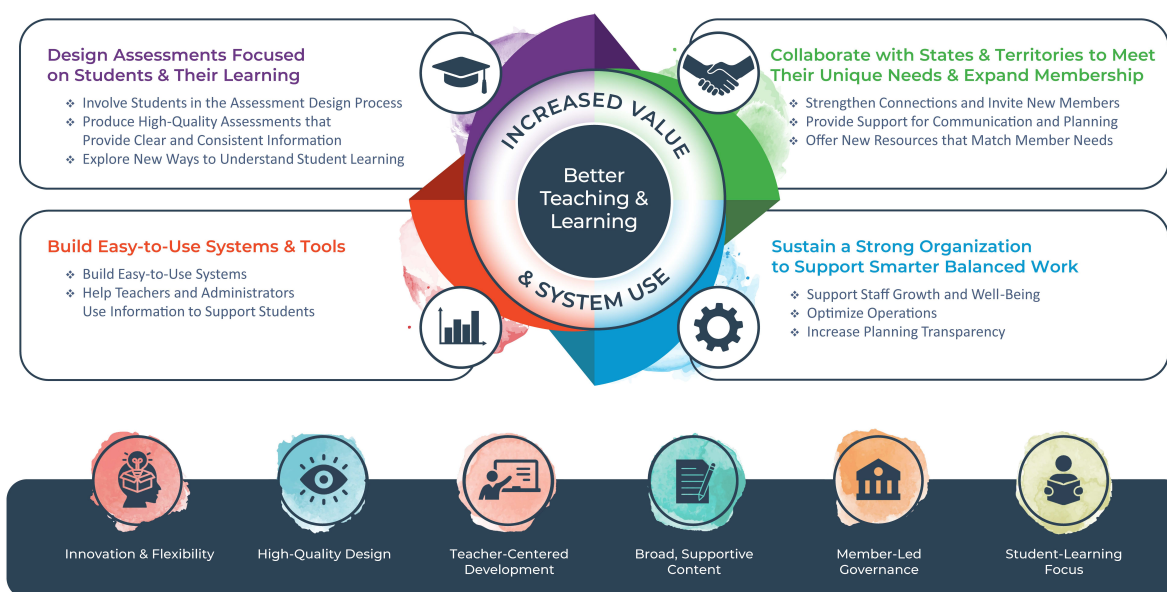
STRATEGIC PLAN THEORY OF ACTION

By leveraging the strengths of the Consortium and prioritizing student experiences in future design, Smarter Balanced can maximize the impact of the assessment system.

Smarter Balanced will accomplish this through a set of key strategies and related goals that serve as a strategic focus for the coming years. This document is not a suggestion that these efforts are not already underway. Rather, it is intended to focus, prioritize, and align the work going forward, ensuring that future initiatives remain anchored in the Smarter Balanced mission and responsive to the evolving needs of teachers and students.

By implementing these strategies, Smarter Balanced aims to continue developing assessment systems that are increasingly useful, relevant, and valuable to students, families, teachers, administrators, and policymakers — ultimately supporting stronger instructional practices and improved student learning outcomes. Many of the priorities, strategies, and goals are designed to build upon the existing strength and momentum of the Smarter Balanced comprehensive assessment system.

Strategic Plan Theory of Action



The strategic priorities outlined in this plan are not listed in order of importance. Each priority is vital to achieving the overall Smarter Balanced mission and will be approached with commitment and focus.

Note on Terminology

Throughout this plan, the use of the term “teacher” should be read as descriptive of all the adults in districts and schools who help students learn, including classroom teachers, special educators, instructional aides, instructional coaches, district leaders, and school leaders.

PRIORITY 1: DESIGN ASSESSMENTS FOCUSED ON STUDENTS AND THEIR LEARNING

Smarter Balanced will build assessments and tools that help students show what they know and can do. These tools will include content that is relevant and engaging to students, supports their learning, and gives them information they can use.

Strategy 1.A: Involve Students in the Assessment Design Process

Smarter Balanced will design assessments that connect with students in ways that are relevant and engaging, and will invite them to be involved in shaping how their learning is measured.

- **Goal 1.A.1:** Establish clear feedback loops between the Consortium and students to strengthen the usefulness of the assessment system.
- **Goal 1.A.2:** Develop questions and content that speak to students' interests and that is relevant.
- **Goal 1.A.3:** Build tools that help students and families understand results and set learning goals.

Strategy 1.B: Produce High-Quality Assessments that Provide Clear and Consistent Information

Smarter Balanced will design high-quality assessments that measure the content students should be learning and that give students, families, teachers, and administrators the information they need in a way that is easy to understand and use.

- **Goal 1.B.1:** Engage experts to support an innovative research agenda and review and verify existing assessment designs for quality, usefulness, and fairness.
- **Goal 1.B.2:** Design high-quality questions and tools that let students show what they know and can do.

Strategy 1.C: Explore New Ways to Understand Student Learning

Smarter Balanced will create new kinds of questions and experiences that let students show what they know and can do in different ways.

- **Goal 1.C.1:** Explore new approaches that let students show what they know and can do in different ways.
- **Goal 1.C.2:** Work with content developers with a wide range of expertise to create materials that connect with today's students.

PRIORITY 2: BUILD EASY-TO-USE SYSTEMS AND TOOLS

Smarter Balanced will design tools and resources that are intuitive, supportive, and aligned to the way teachers work.

Strategy 2.A: Build Easy-to-Use Systems

Smarter Balanced will make it easy for teachers to find and use the tools they need.

- **Goal 2.A.1:** Redesign tools to be more intuitive, efficient, and better aligned with classroom needs.
- **Goal 2.A.2:** Support teacher understanding of how different parts of the system work together.
- **Goal 2.A.3:** Collaborate with teachers to shape new questions, tools, and system improvements.
- **Goal 2.A.4:** Learn how teachers use data in practice and improve tools based on their feedback.
- **Goal 2.A.5:** Streamline processes for districts to access and implement tools and resources.

Strategy 2.B: Help Teachers and Administrators Use Information to Support Students

Smarter Balanced will provide tools and training to help teachers and administrators take meaningful action based on assessment insights.

- **Goal 2.B.1:** Build easy-to-use tools and features that help teachers and administrators plan instruction for each student.
- **Goal 2.B.2:** Offer a range of training and support models to better assist teachers and administrators.
- **Goal 2.B.3:** Establish clear feedback loops with teachers to strengthen the usefulness of the system.
- **Goal 2.B.4:** Increase opportunities for meaningful collaboration with teacher preparation programs.

PRIORITY 3: COLLABORATE WITH STATES AND TERRITORIES TO MEET THEIR UNIQUE NEEDS AND EXPAND MEMBERSHIP

Smarter Balanced will retain and grow membership and support members with tools and approaches that match their unique goals.

Strategy 3.A: Strengthen Connections and Invite New Members

Smarter Balanced will reach out to states and territories that can benefit from tools and support.

- **Goal 3.A.1:** Provide effective messaging that raises awareness about membership and system benefits.
- **Goal 3.A.2:** Offer flexible membership options.
- **Goal 3.A.3:** Provide support to members to manage changes in their educational policies.

Strategy 3.B: Provide Support for Communication and Planning

Smarter Balanced will support members to share clear information with their teachers, administrators, families, and leaders.

- **Goal 3.B.1:** Offer communication tools and resources that clearly explain how the system works and further develop assessment literacy.
- **Goal 3.B.2:** Form partnerships to raise awareness of Smarter Balanced across the country.
- **Goal 3.B.3:** Make it easy for all members to benefit from their state- and territory-specific work.

Strategy 3.C: Offer New Resources that Match Member Needs

Smarter Balanced will develop new tools to meet changing education needs.

- **Goal 3.C.1:** Explore options to support early literacy.
- **Goal 3.C.2:** Identify and pursue opportunities to develop high school assessments and resources that align with student pathway goals and are relevant to evolving expectations in higher education and the changing demands of the workforce.
- **Goal 3.C.3:** Partner with experts and technology companies to bring new ideas into practice.
- **Goal 3.C.4:** Provide technical assistance and support services to help members address assessment and accountability needs.

PRIORITY 4: SUSTAIN A STRONG ORGANIZATION TO SUPPORT SMARTER BALANCED WORK

Smarter Balanced will invest in people, improve operations, and plan effectively to meet the needs of members now and into the future.

Strategy 4.A: Support Staff Growth and Well-Being

Smarter Balanced will continue building a mission-connected team who are supported in their work and are part of a healthy workplace.

- **Goal 4.A.1:** Offer opportunities that help staff grow, stay mission-focused, and feel a sense of purpose and fulfillment in their work.
- **Goal 4.A.2:** Support a positive and respectful work environment by promoting fairness and transparency.

Strategy 4.B: Optimize Operations

Smarter Balanced will strengthen internal systems and find increasingly efficient ways to do work.

- **Goal 4.B.1:** Make internal systems easier to use and manage.
- **Goal 4.B.2:** Use staff feedback to make informed choices about where to improve.
- **Goal 4.B.3:** Better leverage staff expertise and experience for solving complex challenges and implement greater automation for rote tasks.
- **Goal 4.B.4:** Streamline workflows so work moves more smoothly and can be deployed with flexibility when change is needed.

Strategy 4.C: Increase Planning Transparency

Smarter Balanced will plan ahead in ways that help teams work together and stay focused on key priorities.

- **Goal 4.C.1:** Align immediate and long-term priorities with the Strategic Plan.
- **Goal 4.C.2:** Communicate leadership decisions clearly and tie them to organizational needs.

Summary Table of Strategies and Goals by Priority

Priority	Strategy	Goals
Design Assessments Focused on Students and Their Learning	Involve Students in the Assessment Design Process	<ul style="list-style-type: none"> • Establish student feedback loops • Align content with interests • Build tools to help students and families understand results
Design Assessments Focused on Students and Their Learning	Produce High-Quality Assessments that Provide Clear and Consistent Information	<ul style="list-style-type: none"> • Engage experts in research and verify designs • Develop high-quality content
Design Assessments Focused on Students and Their Learning	Explore New Ways to Understand Student Learning	<ul style="list-style-type: none"> • Explore new question types • Broaden content development
Build Easy-to-Use Systems and Tools	Build Easy-to-Use Systems	<ul style="list-style-type: none"> • Make tools easier to use • Support system understanding • Collaborate with teachers • Understand teachers' data needs • Streamline processes for districts
Build Easy-to-Use Systems and Tools	Help Teachers and Administrators Use Information to Support Students	<ul style="list-style-type: none"> • Build tools to support instructional planning • Offer a range of professional development • Establish teacher feedback loops • Collaborate with teacher preparation programs
Collaborate with States and Territories to Meet Their Unique Needs and Expand Membership	Strengthen Connections and Invite New Members	<ul style="list-style-type: none"> • Raise awareness • Offer flexible membership options • Support members navigating education policy shifts
Collaborate with States and Territories to Meet Their Unique Needs and Expand Membership	Provide Support for Communication and Planning	<ul style="list-style-type: none"> • Develop communication tools and resources • Form strategic partnerships • Make it easy for members to benefit from work customized to them
Collaborate with States and Territories to Meet Their Unique Needs and Expand Membership	Offer New Resources that Match Member Needs	<ul style="list-style-type: none"> • Explore early literacy • Develop assessments and resources aligned with higher education expectations and workforce demands • Partner with experts to implement new ideas • Support members in addressing assessment and accountability needs

Priority	Strategy	Goals
Sustain a Strong Organization to Support Smarter Balanced Work	Support Staff Growth and Well-Being	<ul style="list-style-type: none"> ● Focus on staff growth ● Promote fairness and transparency
Sustain a Strong Organization to Support Smarter Balanced Work	Optimize Operations	<ul style="list-style-type: none"> ● Make internal systems easier to use ● Use staff feedback to drive improvement ● Balance staff expertise and automation ● Streamline workflows
Sustain a Strong Organization to Support Smarter Balanced Work	Increase Planning Transparency	<ul style="list-style-type: none"> ● Align workplans to Strategic Plan ● Communicate leadership decisions clearly

NEXT STEPS

Successful Strategic Plan implementation requires coordinated efforts across the internal teams and external partners of Smarter Balanced. The following phases outline the implementation approach:

Phase 1: Communication and Awareness

- Develop and distribute Strategic Plan summaries to all interest holders.
- Organize webinars and virtual meetings to explain the plan's goals and expected outcomes.

Phase 2: Training and Capacity Building

- Create customized plans for staff to align their work with the new Strategic Plan.
- Provide members with resources to help them implement the plan effectively.

Phase 3: Incorporate Feedback

- Monitor policy shifts and reassess strategic priorities as needed.
- Gather feedback from interest holders to evaluate the plan's effectiveness and inform adjustments.

Phase 4: Continuous Improvement

- Establish a structured review cycle to assess progress toward strategic goals.
- Adjust the work based on lessons learned and emerging needs.

Phase 5: Policy Monitoring and Adjustment

- Implement a long-term policy tracking system to monitor relevant law and regulation changes.
- Update resources and implementation strategies to align with policy developments at local and federal levels.

Monitoring and Reporting

- Assign staff to track progress on each strategic priority.
- Develop biannual progress reports to distribute to the Executive Committee and members.
- Conduct an annual review to evaluate outcomes and set priorities for the following year.

This Strategic Plan reaffirms the commitment of Smarter Balanced to leverage interest holder insights and data-driven strategies to enhance assessment quality. Through collaboration, innovation, and continuous improvement, Smarter Balanced will offer assessments that remain effective and valuable for students, families, teachers, administrators, and policymakers.