Exercising strong leadership at the state board level requires boards to engage in a comprehensive strategic planning process every three to five years, recognizing that the plan must be adaptable to unanticipated circumstances. Such a process ensures that every member understands and accepts the agreed-upon vision and mission of the board and knows the strategies for measuring progress toward achieving the board's goals. Equally as important, the board needs to share its plan with the education stakeholders in the state and tie its policy decisions to its long-term strategic plan. Developing a legislative strategy and formulating a policy review cycle aligned to the strategic plan are also critical elements for successful policy development.

Most boards that gather annually in a retreat format use the time for board development, evaluating the previous year’s accomplishments, and discussing the coming year’s priorities. They spend a day-and-a-half or two days working on short-term goals and building a cohesive team. These are important activities for boards to engage in, but if they are done in isolation from a strategic plan, these efforts fail to provide a context in which the board should operate. Boards must be careful not to mistake the annual planning retreat for strategic planning. Although board retreats are a critical component for board growth and for evaluating the implementation of the strategic plan, they are not adequate substitutes for strategic planning.

The strategic plan should be a living document that all board members can relate to. As new members join a state board, they must be thoroughly briefed on the strategic plan and should be supported in efforts to relate their individual concerns to the plan. The majority of people accepting appointments or seeking elections to state boards share similar goals for the state’s students, even when they don’t agree on the existing approaches to achieving those goals. A clear understanding of the board’s mission and strategy for enhancing educational opportunity for all students allows new members to incorporate their values into the common values of the board and allows the board to modify its strategies to accommodate new concerns.

State boards are encouraged to review their current strategic plans and determine if their current agendas and board work are aligned to the plan. If not, they must determine if it is appropriate to engage in a new strategic planning process or if they need to better adjust their agendas and work plans toward achieving the goals outlined in the strategic plan.

When a board engages in strategic planning, it should ensure that the plan is designed to answer at a minimum the following questions:

- What is the purpose or mission of the board in the context of state statutes or the state constitution?
- What is the board’s vision for education in the state?
What policies currently exist to support the board’s vision for education? Who benefits from the current policies? How should current policies be changed or modified to better serve a larger percentage of the student population?

How is the student population changing in the state? How will current policies affect these students? How will board policies change to adapt to changing student populations?

How does the state’s education governance structure support or hinder student improvement? How does the board operate in the context of the governance structure?

What accountability mechanisms will the board use to track implementation of the strategic plan?

How will the board organize its priorities as external circumstances change?

Most experts in the field of strategic planning agree that effective strategic planning depends on accurate, ongoing evaluations of the external and internal environments in which an organization operates. The board’s role in making strategic decisions and in guiding the evaluation of the external and internal environment can determine how effective the board will be in achieving its goals.

External environmental issues include:

- Student performance and achievement levels;
- Changing student populations;
- Public attitudes toward public education;
- Changes in the health and social needs of students;
- Business interests in education; and
- Finance and budget issues.

Internal environmental issues include:

- Department staffing;
- Federal funding of department positions;
- Changes in board composition; and
- Time and structure of board agendas and meetings.

Many boards can point to a mission and vision statement and board goals, but newer members cannot always articulate when the mission and vision were adopted or how they are used in interim planning and evaluation activities. In addition, newer members are sometimes unable to relate to the external and internal influences that were the underlying premises when the statements were adopted, usually because of changing circumstances that are now affecting the system. It is also critical that a board is able to distinguish when the plan simply needs modifying as opposed to when it is time to engage in a new strategic analysis of the needs of the state.

Strategic planning can and should be an integral part of board development. As a board looks to new and challenging circumstances in the months ahead, it should ensure that the board has a road map for where it’s going and that it is working with a useful and comprehensive plan.