Meeting Agenda

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Members Present
Charlie Perusse, Dr. David Ammons, Jessica Englert, Kiernan McGorty, David Smith, Dr. Tonya Smith-Jackson, Kim Van Metre

Minutes

• Call to Order and Opening Remarks – Chairman Perusse begins the meeting.

• FY 2021-23 Budget Update
  o Chairman Perusse provided a brief budget update to members. He noted that this budget, the first comprehensive budget to be completed in several years, included multiple Good Governance items.
    ▪ Multiple agencies received data analytics positions.
    ▪ OSBM received $500,000 for performance evaluation grants. Chairman Perusse reported that OSBM is setting up the process for agencies to apply and remarked that these grants should build stronger ties between government and universities and philanthropic organizations.
    ▪ The budget also included internal auditors for multiple agencies.
  o Chairman Perusse updated members that the Governor signed the technical corrections bill this morning.

• 2021 Performance Management Academy
  o James Aughenbaugh of OSBM gave members a summary of this fall’s Performance Management Academy (PMA) this fall. Thirty-seven employees representing 13 agencies attended the 20-hour training over five half days, listening to numerous speakers discuss a range of topics, from Performance Management 101 to Process Mapping. OSBM shared lessons learned from this year’s program and the next steps to incorporate those lessons into future sessions, such as an increased focus on leading culture change from within an agency and overcoming barriers.
  o Member McGorty asked how attendees originally heard about PMA. Many participants heard about it from co-workers who participated last year. Additionally there is continued interest from co-workers of the active session. The nomination process and interest survey narrowed the interested individuals to the eventual participants.

• Agency Spotlight – From Surveys and Spreadsheets to Real-Time Images and Dashboards
  o Deputy William Toole of the NC Secretary of State (SOS) presented how they are using data from surveys and dashboards to inform their decision-making and better serve the business community. The unexpected increase in new businesses in 2020 and additional growth this year reinforced the need to modernize their digital capabilities to maintain the ability to fulfill the agency’s mission.
  o SOS’s new dashboard showed the team the rejection rate of business filings and the growth of online filings in real time. This data informed their decision to add a button to the website for business filing, which led to more online filings and a decreased rejection rate.
  o The agency argued that other units should have these dashboards to have the necessary flexibility to promptly identify problems and take opportunities. SOS also stressed the importance of project managers to lead the projects.
• Members asked questions about the dashboard’s ease of use and public access to the information.

**Agency Spotlight – NCCCS Data Dashboards: Using System-Wide Data to Inform Local Decisions**

• Elizabeth Stoddard at the NC Community College System (NCCCS) shared the growth of the Research and Performance Management Team and explained how they established principles for dashboards and data, such as consistent methodology and regular updates, before establishing their software to make them practical and engaging.

• The NCCCS dashboards disaggregate the data for multiple variables and are grouped together for users to quickly find the information for which they seek. A variety of viewing options also enable users to make different comparisons of the data. NCCCS constantly adds dashboards to show new data or in a new view and provides webinars to train users on the new tool.

• NCCCS got access to Power BI earlier this year, which has allowed them to securely give student-level data to all community colleges. The team at NCCCS can tailor and deliver the data based on the resources available and the needs of the individual institutions.

• Members asked about the internal capacity to develop the dashboards and the usability of the information. NCCCS did a focus group early in the process to help them better understand the data. Community colleges have shared that many data requests and reporting requirements can be handled using the dashboards.

**Survey on State Government Performance Management Landscape**

• Taylor Coburn and Izzi Hernandez-Cruz from OSBM shared the results from the Performance Management Landscape Survey that 22 agencies, three universities, and one commission answered with feedback on performance management within their work. Agencies generally have a good understanding of performance management and evidence-based practices and are applying these methods to different degrees, often in strategic planning, benchmark reporting, and implementation of dashboards.

• Survey respondents understand how performance management can improve program and operational efficiency, and a majority reported participating in OSBM or other training on performance management. Even with that training, respondents indicated that barriers to conducting these projects include a lack of or consistent performance management and data analytics skills.