North Carolina Performance Management Academy

Dates:	Fall 2026, Sept. 29th, Oct. 1st, 8th, 15th, 20th, & 22nd (six days)
Time:	8:30 am – 1:00 pm
Location:	Albemarle Building, Room 240 325 N. Salisbury St, Raleigh NC
Course website:	PMA Foundations - 2026
Course contact:	pma@osbm.nc.gov
Lead instructor:	David Yokum, OSBM Chief Scientist

The Performance Management Academy (PMA) is a series of trainings, events, and peer convenings for North Carolina state employees to share and build expertise in performance management. The Foundations course is the signature, introductory course into the PMA. Participants learn a variety of concepts and skills, including how to:

- Apply strategic planning to prioritize and manage limited resources.
- Use evidence to continuously improve policies and programs.
- Engage additional NC resources, partners, and colleagues to continue building performance management expertise over the years.

Over four weeks, Academy participants will attend six class days of 4.5 hours each. Assigned reading (and thinking!) will take about 1.5 hours per class. So overall the PMA requires a commitment of about 30 hours of effort. Participants are expected to attend the entirety of every class and to come prepared to discuss assigned material and participate in activities. Only prepared, active participation can empower the feedback and practice necessary to master the material.[1]

[1] For a research review, see Peter C. Brown, Henry L. Roediger III, & Mark A. McDaniel. *Make It Stick: The Science of Successful Learning*. Harvard University Press: 2014.

CLASS SCHEDULE

Tue 9/29 Day 1: Priorities & Problem Framing

We start with a brief overview of the concepts and strategies of performance management. We'll elaborate on these ideas and skills throughout the PMA.

After this overview, we'll explore setting and planning priorities. We'll learn how strategic plans help us coordinate priorities and how SMART goals and objectives, tethered to performance measures, help us use those plans day by day to deliver on targeted outcomes. We'll practice techniques for pressing for a deeper understanding of what problem needs to be solved.

Learning Objectives

1. Explain the theory and purpose of performance management (PM).
2. Describe the strategic planning process in NC state government.
3. Understand how strategic planning practices also apply to personal performance planning (e.g. NCVIP).
4. Describe and distinguish strategic planning terminology: mission; vision; values; goals; objectives; performance measures; SMART.
5. Critique a strategic plan.
6. Write a SMART goal or objective.
7. Use reframing techniques to rigorously scope a problem statement.

Pre-Reading / Homework

- ☐ Syllabus (this is the document you're reading now!)
- ☐ OSBM's Strategic Planning Guide
- ☐ Your agency's strategic plan (see here for agency plans)
- ☐ OSBM's 2025-2029 Strategic Plan

Speakers

- David Yokum, Chief Scientist, OSBM
- Wendy Pendergraph, Chief Financial Officer, SOS
- Sharrice Blackmon, Program Analyst, DOA

References & Recommended Reading

- ☐ A.E. Buck, Measuring the results of government (1924)

Thur 10/1 Day 2: Logic Models & Program Planning

Today we'll explore logic models, which are visual representations that explain the theory of how resources invested in a program or policy cause changes in an outcome. These models clarify the purpose of a program or

policy and sharpen thinking about what assumptions must be met in order to deliver on that purpose.

We'll practice interpreting, critiquing, and building logic models. We'll also see how this thinking carries into the program purpose and logic-model sections of the Justification Documentation Form (JDF).

Learning Objectives

1. Describe logic model terminology: inputs; outputs; outcomes; causal impact.
2. Interpret, critique, and build a logic model.
3. Describe the purpose of the Justification Documentation Form (JDF) and complete its logic model sections.

Pre-Reading / Homework

- ☐ Justification Documentation Form (JDF)
- ☐ Identify 2-3 ways to improve your agency's strategic plan.
- ☐ Reframe a problem you're involved in.

Speakers

- Andrew Feldman, Founder & Principal Consultant, Center for Results-Focused Leadership
- David Yokum, Chief Scientist, OSBM

Thur 10/8 Day 3: Implementing

With a strategic plan and logic models in place, we now need to *deliver*. This entails ensuring that things work as expected and adapting to unexpected challenges or faulty assumptions. We'll explore implementation techniques, notably agile development, that can empower you and your team to relentlessly deliver outcomes.

Learning Objectives

1. Describe agile development and how it differs from traditional waterfall approaches.
2. Describe the key roles, ceremonies, and artifacts in the Scrum framework.
3. Write user stories.
4. Generate and triage a product / task backlog.
5. Plan a sprint based on team velocity and story point estimation.

Pre-Reading / Homework

- ☐ Agile Manifesto & 12 Principles of Agile Software
- ☐ Draft a logic model for a program or policy you're involved in.

Speakers

- Steven DelGrosso, CEO, Talos, IV, LLC

References & Recommended Reading

- ☐ The Scrum Guide, at Scrum.org
- ☐ Sutherland, Scrum: The Art of Doing Twice the Work in Half the Time (2014)

Thur 10/15 Day 4: Finding and Using Evidence

What are practices to measure and understand what is working (or not working) and why? We'll explore the concept of evidence and provide a tour of methods, both qualitative and quantitative, commonly used to find or generate evidence. We'll further develop the role of evidence in strategic planning.

What is the psychology of how people make sense of data? What does it take to change minds, including your own? We'll explore cognitive mistakes that arise from motivated reasoning and introduce tools for limiting the influence of bias.

Learning Objectives

1. Craft a meaningful Priority Question.
2. Build intuitions for what type of method(s) might be needed to answer different types of questions.
3. Describe the difference between descriptive, predictive, and causal claims.
4. Describe common terminology in quantitative methods: counterfactual; randomized controlled trial (RCT); quasi-experimental design (QED); point estimate; confidence interval.
5. Describe motivated reasoning.
6. Understand how and when to use a pre-analysis plan.
7. Describe 2–3 case study applications of PM concepts in NC.

Pre-Reading / Homework

- ☐ Strategic Planning Guide | § Priority Questions & Appendix C
- ☐ Justification Documentation Form (JDF)
- ☐ Yokum & Bowers, The value of pre-analysis plans (2023).
- ☐ Draft a Priority Question related to your logic model.

Speakers

- David Yokum, Chief Scientist, OSBM

References & Recommended Reading

- ☐ OMB M-21-27, Evidence-Based Policymaking: Learning Agendas and Annual Evaluation Plans
- ☐ Glennerster & Takavarasha, Running Randomized Evaluation: A Practical Guide (2013)
- ☐ Don Norman, The Design of Everyday Things (1988/2013)
- ☐ USDS Digital Services Playbook.

Tue 10/20 Day 5: Visualizing and Communicating Evidence

How can we make sense of data and communicate what it tells us? We'll explore how data visualizations, when rightly done, can help us understand evidence and share it with others. We'll practice recognizing common misuses of data and presenting findings clearly.

We'll look at how evidence informs budget development, including the evidence portions of the Justification Documentation Form (JDF). We'll also discuss the interplay of evidence and decision-making within the world of politics.

Learning Objectives

1. Describe common types of data visualizations.
2. Build intuitions to stay alert against common misuses of data.
3. Complete the evidence portions of the JDF.

Pre-Reading / Homework

- ☐ Justification Documentation Form (JDF)
- ☐ Refine 2-3 performance measures in your logic model; at least one should be to measure an outcome. What method(s) are best fit for estimating those measures?

Speakers

- Dale Roenigk, Instructor, UNC School of Government
- Legislators, TBD

References & Recommended Reading

- ☐ Alberto Cairo, The Truthful Art: Data, Charts, & Maps for Communication (2016)

Thur 10/22 Day 6: Artificial Intelligence & PMA Frontiers

What are new developments in performance management? Where will you go in applying what you've learned in the PMA?

Today we'll explore artificial intelligence and its emerging uses, including opportunities to use these tools in your own work and to find evidence.

We'll explore how the NC Project Portal can help you find research partners, and we'll leave room to return to questions and topics raised during the course. The PMA ends with an overview of other Academy activities and resources, so you're empowered to stay connected in, and contribute to, the community of practice.

Learning Objectives

1. Describe how artificial intelligence works (at a high level).
2. Explore uses of Microsoft Copilot in your own workflow.
3. Practice using AI, and related tools, to find evidence.
4. Understand how to get partnership help via the NC Project Portal.
5. Understand how to stay connected and contribute to the Academy!

Pre-Reading / Homework

- ☐ North Carolina Statewide AI Strategic Roadmap
- ☐ Explore the NC Project Portal
- ☐ Project Intake Form

Speakers

- Richard Marks, Professor, UNC School of Data and Information Sciences
- David Yokum, Chief Scientist, OSBM