North Carolina Performance Management Academy

PMA FOUNDATIONS | 2025 SYLLABUS

Course Details:

Dates:	Fall 2025, Oct. 28th, 30th, Nov 6th, 13th, 18th, & 19th (6 days)
Time:	8:30 am – 1:00 pm
Location:	Albemarle Building, Room 245 325 N. Salisbury St, Raleigh NC
Course website:	PMA Foundations - 2025
Course contact:	pma@osbm.nc.gov

Course Overview:

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.

Time Commitment:

Over 4 weeks, Academy participants will attend 6 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 maDaily ster 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 10/28 Day 1: Setting and Planning Priorities (Part 1 of 2)

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. Part 1 focuses on 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.

Learning Objectives (after the module and practice, you will be able to:)

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

Pre-Reading / Homework

- ☐ Syllabus (this is the document you're reading now!)
- ☐ Justification Documentation Form (JDF)

Speakers

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

References & Recommended Reading

- ☐ Osborne & Plastrik, The Reinventor's Fieldbook (2000)

Thur 10/30 Day 2: Setting and Planning Priorities (Part 2 of 2)

We'll learn how strategic plans empower coordinating priorities and, with SMART goals and objectives—tethered to performance measures—how to *use* those plans day-by-day to deliver on targeted outcomes. We'll practice techniques for how to press for a deeper understanding of what problem needs to be solved. We'll explore how to use evidence as a part of these processes and how to plan for the generation of evidence where it is lacking (via the Priority Questions portion of a strategic plan).

Learning Objectives

1. Describe the strategic planning process in NC state government.

2. Understand how strategic planning practices also apply to personal performance planning (e.g. NCVIP).
3. Describe and distinguish strategic planning terminology: mission; vision; values; goals; objectives; performance measures; SMART; priority questions.
4. Critique a strategic plan.
5. Write a SMART goal or objective.
6. Define what is a Priority Question and provide 2-3 examples.
7. Identify 2-3 Priority Questions in your agency.
8. Use reframing techniques to rigorously scope a problem statement.

Pre-Reading / Homework

- ☐ Draft a logic model for a program or policy you're involved in.
- ☐ OSBM's Strategic Planning Guide
- ☐ Your agency's strategic plan (see here for agency plans)
- ☐ OSBM's 2025-2029 Strategic Plan

Speakers

- Wendy Pendergraph, Chief Financial Officer, SOS
- Sharrice Blackmon, Program Analyst, DOA
- Thomas Wedell-Wedellsborg, Author & Speaker

References & Recommended Reading

- Thomas Wedell-Wedellsborg, What's Your Problem (2020)

Thur 11/6 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

Speakers

- Steven DelGrosso, CEO, Talos, IV, LLC

References & Recommended Reading

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

Thur 11/13 Day 4: Finding & Generating 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. This includes a special dive into how data visualizations, when rightly done, can help us make sense of data.

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. Understand how and when to use a pre-analysis plan.
6. Describe common type of data visualizations.
7. Build intuitions to stay alert against common misuses of data.

Pre-Reading / Homework

- ☐ Strategic Planning Guide | § Priority Questions & Appendix C
- ☐ Add 2-3 performance measures to your logic model; at least one should be to measure an outcome.

Speakers

- Carrie Hollis, Principal Program Analyst, OSBM
- Dale Roenigk, UNC School of Government
- 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)
- ☐ Alberto Cairo, The Truthful Art: Data, Charts, & Maps for Communication (2016)

Tues 11/18 Day 5: Using Evidence

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. We'll tour a variety of practical applications of evidence within NC state government, such as during budget development, procurement, or efficiency projects. We'll discuss with legislative liaisons their experiences with the interplay of evidence and decision-making within the world of politics.

Learning Objectives

1. Describe what are behavioral insights, with 2-3 examples.
2. Describe motivated reasoning.
3. Explain why a pre-analysis plan can help change minds.
4. Complete the evidence portions of the JDF.
5. Describe 2-3 case study applications of PM concepts in NC.

Pre-Reading / Homework

- ☐ Justification Documentation Form (JDF)
- ☐ Yokum & Bowers, The value of pre-analysis plans (2014).
- ☐ Draft a Priority Question related to your logic model.

Speakers

- Justin Davis, Legislative Affairs Director, Department of Adult Correction
- Wes Kyatt, Legislative Liaison, Department of Administration
- John Ducey, Legislative Director, Office of the Governor
- Mike Arnold, Chief Operations Officer, Office of State Budget & Management

References & Recommended Reading

- ☐ Don Norman, The Design of Everyday Things (1988/2013)
- ☐ USDS Digital Services Playbook.

Wed 11/19 Day 6: Frontiers in Performance Management

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. We also have a placeholder for "flex time" —a deliberately unscheduled slot of time, that as a group we'll decide how we want to fill it. The PMA ends with an overview of other Academy activities and resources, to empower you to stay connected in—and contributing to—the community of practice.

Learning Objectives

1. Describe how artificial intelligence works (at a high level).

2. Understand conceptually how LLMs are able to generate text, video, and audio.
3. Explore uses of Microsoft CoPilot in your own workflow.
4. Practice using AI, and related tools, to find evidence.
5. Understand how to get partnership help via the NC Project Portal.

Pre-Reading / Homework

- ☐ Explore the NC Project Portal
- ☐ Project Intake Form
- ☐ Consider whether a research partner would help you answer your Priority Question; what kind of partner skills might be helpful; if you're feeling particularly adventurous – and indeed if you really want to get help – take a whack at filing out the Project Intake Form.

Speakers

- Rick Marks, Professor of the Practice, UNC-Chapel Hill School of Data Science & Society
- David Yokum, Chief Scientist, OSBM