

U.S. Department of Transportation
Human Resource Balanced Scorecard Instrument
FACT SHEET
September 2002

The DOT HR balanced scorecard instrument (BSI) evaluates an Administration’s delivery of HR services and information. Since 1998, the team has used a balanced scorecard discipline founded on the performance management concepts developed by Kaplan and Norton. The scorecard discipline gathers perspectives of customers, employees, and managers in evaluating an organization’s performance. For all Administrations, the BSI survey measures the following HR performance areas:

- Timeliness
- Quality
- Service/Partnerships
- Quality Work Environment
- Executive Leadership
- Excellence in HR Programs
- Effective Use of Information Technology
- Quality Workforce
- Mission Goals
- Financial Perspective.

Once every two years the BSI follows this process:

Milestone	FY Quarter	Responsibility
Review/update of survey statements	1st	HR Measurement Action Team (HRMAT)
Update and test survey system	2nd	M12
Initiate survey	3rd	HRMAT, M12 & M13
Issue survey assessment reports	4th	M12
Implement outreach to customers and employees	4th	HRMAT
Develop action plans	1st	HRMAT and M13
Implement and track plans	1st	HRMAT and M13

Recently, the team completed the 2002 survey, in which all modes participated. Each organization received the following reports at the conclusion of the process:

- Customer and employee reports that identify the total responses for each statement/question.
- The HR managers report is a detailed list of the responses of the manager.
- Summary performance charts, “spider charts,” identify in one page the overall performance of an Administration in relation to the average of all Department organizations. See attached report for the Federal Railroad Administration (FRA).
- Performance assessment charts, which are always provided for three critical performance areas: timeliness, quality, and service partnership, and are available in other areas. These