How efficient is your agency? A self-assessment worksheet for public sector teams

Evaluate your systems, uncover gaps, and see where automation can help you do more with less.

Public sector agencies are expected to deliver more services, prove outcomes, and maintain compliance all with limited resources. Use this worksheet to assess your current level of efficiency and identify where tools like Bonterra Apricot for Government can support your mission.

Section 1: Efficiency Challenges

Check all that apply to your agency:

- We rely on manual data entry across multiple systems
- We can't easily share data with internal or external partners
- We have limited visibility across our programs
- Our intake and referral processes are inconsistent or slow
- Staff spend significant time building reports
- Our reporting process takes more than a week per cycle
- Data collection processes vary across departments
- We frequently catch errors in submitted documentation
- We struggle to keep pace with compliance requirements
- There's no centralized view of client data across services

Section 2: Outcome Readiness

Rate each on a scale of 1 (Low) to 5 (High):

Statement	1	2	3	4	5
We can easily demonstrate program outcomes to funders and key stakeholders.					
Our data systems support real-time dashboards and analysis					
We feel confident in our reporting accuracy and consistency					
Staff have the tools needed to collaborate across programs					
Our systems help us track participant journeys across services					

What your results might tell you

Checked 4+ boxes in Section 1?

Your agency is facing common public sector pain points.
There's opportunity to streamline and strengthen key areas of your work.

Mostly 1s–3s in Section 2?

Gaps in reporting and data confidence could hold back outcomes and funding.

Bonterra Apricot for Government brings all your case management, reporting, and data needs into one secure, efficient system built for public sector complexity.

With powerful automation capabilities, Apricot reduces manual tasks like data entry, reporting prep, and referral tracking, helping your team move faster, collaborate better, and stay focused on the work that matters most.

Ready to see what streamlined success looks like?

Book a meeting

Bonterra