**TEFN – Back Office Efficiency Self-Assessment for Education Foundations**

April 2022

Instructions: Fill this out as best you can. Make notes as appropriate. Once its complete, use the column with the star to pick your top three priorities for follow up this year. Remember that no organization is perfect – but the most successful ones take steps every year to improve.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **At my organization …** | **Yes** | **No** | **Don’t know** | | **Notes** |  |
| … I am confident all our vendors give us a great rate |  |  |  |  | |  |
| … I am confident that all our vendors do great work |  |  |  |  | |  |
| … we use a donor management system (or CRM) designed for that purpose |  |  |  |  | |  |
| … we do not use QuickBooks as our main source of donor data |  |  |  |  | |  |
| … we use modern, appropriate technology everywhere |  |  |  |  | |  |
| … we provide fast, modern computers to all staff |  |  |  |  | |  |
| … we have fast, dependable internet |  |  |  |  | |  |
| … we have prompt, reliable tech support (not DIY) |  |  |  |  | |  |
| … we use staff time efficiently |  |  |  |  | |  |
| … our admin staff regularly receives training and can stay up to date in the fields they’re responsible for |  |  |  |  | |  |
| … our admin staff can focus their full energy on just one or two specialties (like bookkeeping, technology, HR, office manager, greeter, programs, events, fundraising, admin/exec assistant) |  |  |  |  | |  |
| … our admin staff has good work/life balance and a reasonable number of responsibilities |  |  |  |  | |  |

For questions and additional information, contact:

Sean Hale sean@seanhale.org www.SeanHale.org