

2026 Board Survey Report

Area Agency on Aging of Pasco-Pinellas

Prepared by The Carter Firm

Introduction

Purpose of the Survey: The survey was conducted to assess the effectiveness and engagement levels of the Area Agency on Aging of Pasco-Pinellas Board. The aim was to gather insights from individual participants and board members regarding key aspects of the organization's operations, including mission alignment, general knowledge, agency knowledge, roles and responsibilities, and participation.

Methodology: The 2026 survey data included nine completed responses. Participants rated their own performance as well as that of the board across several key areas. The results were compared with benchmark averages used in the 2025 report and with the organization's 2024 and 2025 results to identify strengths, shifts, and areas for improvement.

Data Notes and Assumptions

- Ten surveys were submitted. One record was incomplete at 2% progress and was excluded from the analysis.
- Most results are based on nine valid responses. The two mission and vision items had eight valid responses because one completed response omitted those two questions.
- For consistency, this report uses the benchmark values presented in the 2025 report.
- Likert-scale responses were scored from 1 to 5, with Strongly disagree = 1 and Strongly agree = 5.
- NPS was calculated using valid responses only.

Executive Summary

Key Findings:

Strong Governance Fundamentals Remain in Place: The strongest 2026 results were in avoiding conflicts of interest, support through attendance, being informed about important issues, follow-through on commitments, and understanding the mission and vision. These are foundational board behaviors, and the scores suggest the board continues to operate from a strong governance base.

Strategic Engagement Remains a Strength: The board rated highly on annual goal development and long-term strategy. Board ratings for long-term strategic planning increased from 2025 and remain well above both the benchmark and the 2024 result.

Results Moderated from 2025 but Remain Generally Strong: The 2026 results are not quite as elevated as the exceptional 2025 results. However, the organization still exceeds the benchmark in 39 of 40 measured self/board scores and remains above 2024 in most areas.

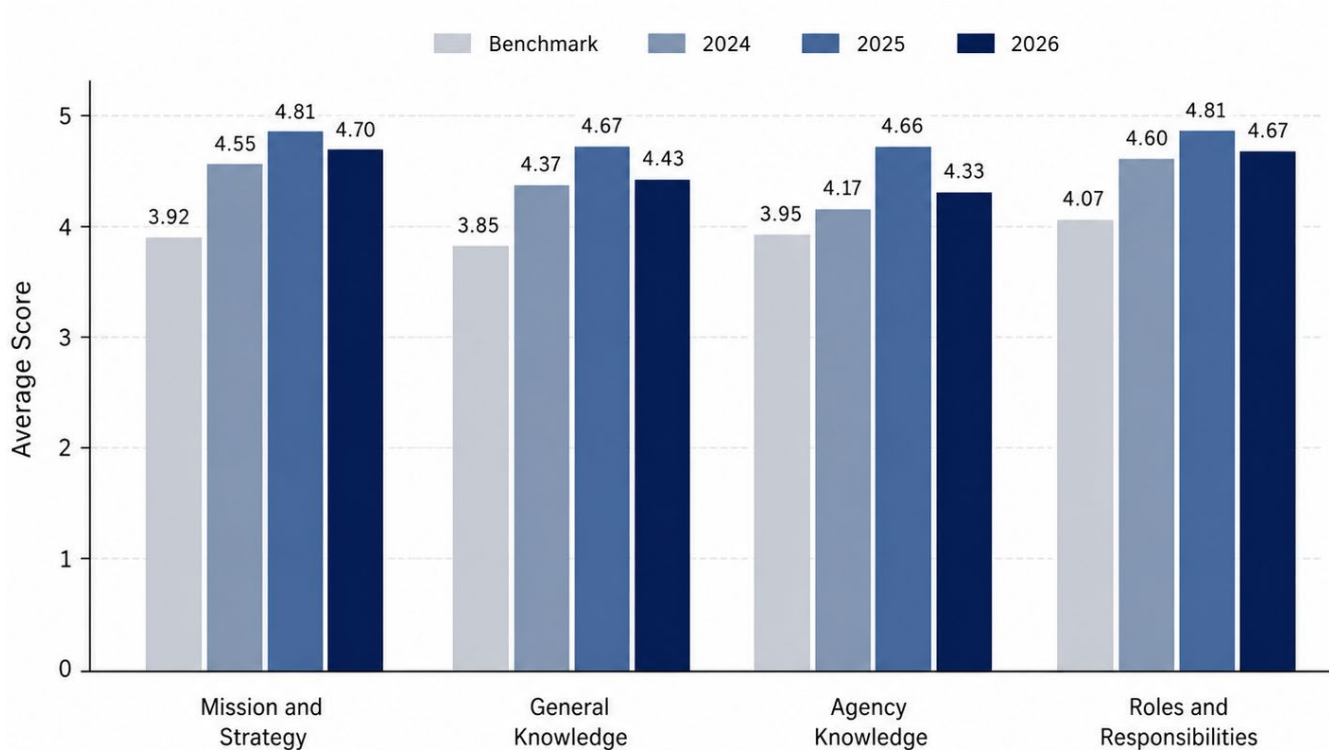
Development Opportunities Are Clear: The lowest 2026 areas were experience and skills, knowledge of operations, participation in selecting and developing board leadership, and fundraising. These are not crisis areas, but they provide practical targets for board development.

Satisfaction Is Positive, Though Less Strong Than 2025: The 2026 Net Promoter Score is 67, compared with 90 in 2025 and 60 in 2024. It is important to note that with only 9 valid NPS responses, one detractor materially affects the score, but the decrease is still worth attention.

2026 Category Dashboard

The table below shows combined self and board averages by category. It is intended as a high-level board dashboard, not a replacement for the item-level analysis that follows.

Category	Benchmark	2024	2025	2026
Mission and Strategy	3.92	4.55	4.81	4.71
General Knowledge	3.85	4.37	4.67	4.43
Agency Knowledge	3.95	4.17	4.66	4.33
Roles and Responsibilities	4.07	4.60	4.81	4.67



Performance Highlights

- The organization continues to outperform the benchmark across nearly all measured areas, with the only below-benchmark score being self-rated experience and skills.
- Attendance, conflict-of-interest awareness, follow-through, and issue awareness are clear strengths and should be reinforced through onboarding and committee leadership practices.
- Compared with 2025, several areas declined modestly, especially agency knowledge, utilization of skills, and leadership development. This suggests a need to refresh board education and succession planning rather than a need for wholesale change.
- Compared with 2024, most measures remain improved, indicating that the board has retained much of the progress reflected in the 2025 report.

Detailed Analysis

Unless noted otherwise, 2026 averages are based on nine valid responses. The mission and vision items are based on eight valid responses due to one missing response on those two questions.

Mission and Strategy

Understands the Mission and Vision

- **Benchmark:** 4.32 (Self), 4.07 (Board)
- **Organization:** 4.88 (Self), 4.88 (Board)
- **Difference:** +0.56 (Self), +0.81 (Board)
- **Change from 2025:** -0.12 (Self), -0.12 (Board)

Properly Represents the Organization

- **Benchmark:** 4.12 (Self), 3.91 (Board)
- **Organization:** 4.56 (Self), 4.33 (Board)
- **Difference:** +0.44 (Self), +0.42 (Board)
- **Change from 2025:** +0.00 (Self), -0.56 (Board)

Active Role in Developing Annual Goals

- **Benchmark:** 3.79 (Self), 3.78 (Board)
- **Organization:** 4.67 (Self), 4.78 (Board)
- **Difference:** +0.88 (Self), +1.00 (Board)
- **Change from 2025:** -0.11 (Self), +0.00 (Board)

Active Role in Developing Long-term Strategy

- **Benchmark:** 3.69 (Self), 3.70 (Board)
- **Organization:** 4.67 (Self), 4.89 (Board)
- **Difference:** +0.98 (Self), +1.19 (Board)
- **Change from 2025:** +0.00 (Self), +0.11 (Board)

General Knowledge

Familiar with Non-Profit Challenges

- **Benchmark:** 4.14 (Self), 3.87 (Board)
- **Organization:** 4.56 (Self), 4.33 (Board)
- **Difference:** +0.42 (Self), +0.46 (Board)
- **Change from 2025:** -0.33 (Self), -0.42 (Board)

Active in Charitable or Community Organizations

- **Benchmark:** 4.09 (Self), 3.74 (Board)
- **Organization:** 4.78 (Self), 4.56 (Board)
- **Difference:** +0.69 (Self), +0.82 (Board)
- **Change from 2025:** -0.10 (Self), +0.12 (Board)

Utilization of Skills and Expertise

- **Benchmark:** 3.78 (Self), 3.49 (Board)
- **Organization:** 4.11 (Self), 4.22 (Board)
- **Difference:** +0.33 (Self), +0.73 (Board)
- **Change from 2025:** -0.33 (Self), -0.40 (Board)

Agency Knowledge

Knowledge of Organization's Operations

- **Benchmark:** 3.89 (Self), 3.65 (Board)
- **Organization:** 4.11 (Self), 4.00 (Board)
- **Difference:** +0.22 (Self), +0.35 (Board)
- **Change from 2025:** -0.33 (Self), -0.56 (Board)
- **Change from 2024:** -0.11 (Self), +0.00 (Board)

Familiar with Financial Status

- **Benchmark:** 4.21 (Self), 3.99 (Board)
- **Organization:** 4.56 (Self), 4.33 (Board)
- **Difference:** +0.35 (Self), +0.34 (Board)
- **Change from 2025:** -0.11 (Self), -0.42 (Board)
- **Change from 2024:** +0.34 (Self), +0.22 (Board)

Experience and Skills

- **Benchmark:** 3.84 (Self), 3.92 (Board)
- **Organization:** 3.78 (Self), 4.11 (Board)
- **Difference:** -0.06 (Self), +0.19 (Board)
- **Change from 2025:** -0.55 (Self), -0.64 (Board)
- **Change from 2024:** -0.22 (Self), +0.00 (Board)

Informed about Important Issues

- **Benchmark:** 4.10 (Self), 4.00 (Board)
- **Organization:** 4.78 (Self), 5.00 (Board)
- **Difference:** +0.68 (Self), +1.00 (Board)
- **Change from 2025:** -0.11 (Self), +0.11 (Board)
- **Change from 2024:** +0.34 (Self), +0.78 (Board)

Roles and Responsibilities

Supports through Personal Contributions

- **Benchmark:** 4.18 (Self), 3.89 (Board)
- **Organization:** 4.44 (Self), 4.33 (Board)
- **Difference:** +0.26 (Self), +0.44 (Board)
- **Change from 2025:** -0.34 (Self), -0.27 (Board)
- **Change from 2024:** -0.12 (Self), -0.23 (Board)

Awareness of Roles and Responsibilities

- **Benchmark:** 4.24 (Self), 3.89 (Board)
- **Organization:** 4.78 (Self), 4.67 (Board)
- **Difference:** +0.54 (Self), +0.78 (Board)
- **Change from 2025:** +0.00 (Self), -0.08 (Board)
- **Change from 2024:** +0.34 (Self), +0.23 (Board)

Understanding of Role Differences

- **Benchmark:** 4.20 (Self), 3.80 (Board)
- **Organization:** 4.56 (Self), 4.67 (Board)
- **Difference:** +0.36 (Self), +0.87 (Board)
- **Change from 2025:** -0.33 (Self), -0.11 (Board)
- **Change from 2024:** -0.11 (Self), +0.23 (Board)

Roles and Responsibilities (Continued)

Avoiding Conflicts of Interest

- **Benchmark:** 4.37 (Self), 4.00 (Board)
- **Organization:** 5.00 (Self), 4.89 (Board)
- **Difference:** +0.63 (Self), +0.89 (Board)
- **Change from 2025:** +0.11 (Self), -0.11 (Board)
- **Change from 2024:** +0.11 (Self), +0.11 (Board)

Participation

Active Role in Fundraising

- **Benchmark:** 3.68 (Self), 3.55 (Board)
- **Organization:** 4.11 (Self), 4.22 (Board)
- **Difference:** +0.43 (Self), +0.67 (Board)
- **Change from 2025:** +0.11 (Self), -0.07 (Board)
- **Change from 2024:** +0.22 (Self), +0.09 (Board)

Participation in Committees

- **Benchmark:** 4.02 (Self), 3.76 (Board)
- **Organization:** 4.78 (Self), 4.67 (Board)
- **Difference:** +0.76 (Self), +0.91 (Board)
- **Change from 2025:** -0.11 (Self), -0.19 (Board)
- **Change from 2024:** -0.01 (Self), +0.11 (Board)

Support through Attendance

- **Benchmark:** 4.27 (Self), 3.89 (Board)
- **Organization:** 5.00 (Self), 4.89 (Board)
- **Difference:** +0.73 (Self), +1.00 (Board)
- **Change from 2025:** +0.22 (Self), +0.11 (Board)
- **Change from 2024:** +0.56 (Self), +0.89 (Board)

Follow-through on Commitments

- **Benchmark:** 4.20 (Self), 3.82 (Board)
- **Organization:** 4.89 (Self), 4.89 (Board)
- **Difference:** +0.69 (Self), +1.07 (Board)
- **Change from 2025:** +0.00 (Self), +0.14 (Board)
- **Change from 2024:** +0.22 (Self), +0.56 (Board)

Participation in Selecting Leadership

- **Benchmark:** 3.65 (Self), 3.66 (Board)
- **Organization:** 4.11 (Self), 4.11 (Board)
- **Difference:** +0.46 (Self), +0.45 (Board)
- **Change from 2025:** -0.27 (Self), -0.56 (Board)
- **Change from 2024:** +0.33 (Self), +0.22 (Board)

Net Promoter Score Analysis

The Net Promoter Score (NPS) is calculated based on responses to the question, "How likely are you to recommend serving on this board to a colleague or friend?"

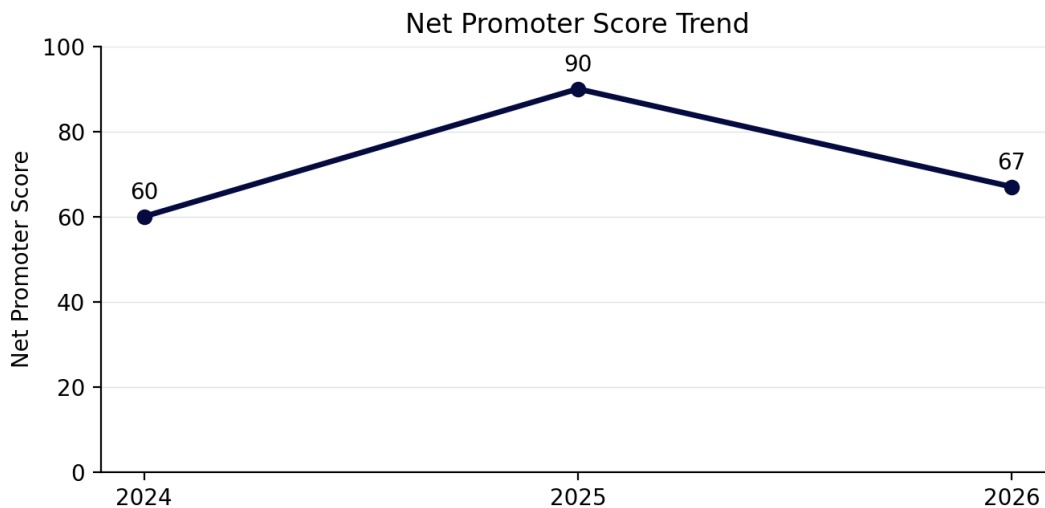
Promoters: Scores of 9 or 10 | Passives: Scores of 7 or 8 | Detractors: Scores of 0 to 6

NPS Calculation Formula: $NPS = \%Promoters - \%Detractors$

- Promoters: 7 out of 9 (77.8%)
- Passives: 1 out of 9 (11.1%)
- Detractors: 1 out of 9 (11.1%)

NPS = 77.8% - 11.1% = 66.7, rounded to 67

Analysis: The 2026 NPS of 67 reflects positive board advocacy, but it is lower than the 2025 score of 90. Because the NPS sample includes 9 responses, one detractor moves the score significantly. It is important to note that 7 out of 9 members are promoters.



Comparative Analysis

- The organization remains above the benchmark in 39 of 40 measured self/board scores. The exception is self-rated experience and skills, which scored 3.78 against a benchmark of 3.84.
- The 2026 results declined from 2025 in 27 of 40 measured self/board scores, improved in eight, and were essentially unchanged in five. This does not erase the 2025 gains, but it does suggest the 2025 results represented a high-water mark rather than a new permanent baseline.
- Compared with 2024, the 2026 results improved in 26 of 40 measured self/board scores, declined in nine, and were unchanged in five. The longer trend remains favorable.
- The strongest year-over-year improvements from 2024 continue to appear in attendance, issue awareness, follow-through, long-term strategy, and board leadership participation.
- The most meaningful 2026 soft spots are agency knowledge, experience and skills, utilization of board expertise, and leadership pipeline participation. These are appropriate targets for board education, committee assignments, and succession planning.

Recommendations

Refresh Board Development Around Experience, Skills, and Operations: Use short education segments during board meetings to deepen understanding of major programs, services, funding streams, and the operating environment. Pair this with a board skills matrix so the organization can see where expertise is strong and where it needs to be developed or recruited.

Build a More Intentional Leadership Pipeline: Participation in selecting and developing board leadership remains positive but is one of the lower-scoring areas. Create a simple annual succession conversation, rotate committee leadership opportunities, and identify future officers earlier in the year.

Leverage Board Skills More Deliberately: Several respondents appear to believe the organization could make better use of board member skills. Conduct a quick skills inventory and connect board members to committees, advisory roles, community introductions, or special projects where their experience can be used well.

Maintain the Strategic Planning Cadence: Strategy remains a strength. Continue involving the board in annual goals and long-term planning, but keep the process practical: a mid-year strategy check-in, a year-end priorities discussion, and a concise dashboard tied to strategic goals would keep the board engaged without adding unnecessary burden.

Follow Up on the NPS Shift: The NPS is still positive, but the drop from 2025 deserves attention. Consider a brief confidential follow-up with board members or a two-question pulse survey focused on what would make board service more effective and more recommendable.

Protect the Current Strengths: High scores in attendance, conflict-of-interest awareness, mission understanding, issue awareness, and follow-through should be documented in onboarding materials and reinforced through board norms. These strengths are part of the board culture and should not be taken for granted.

Conclusion and Next Steps

The 2026 Board Survey results reflect a board that remains engaged, mission-aligned, and operationally healthy. The results are not as uniformly strong as the 2025 report, and the NPS declined from 90 to 67. At the same time, the organization continues to outperform the benchmark in nearly every measured area and remains ahead of 2024 across most measures.

To build on this position:

- Continue annual surveys and consider a short mid-year pulse check focused on board experience and support needs.
- Provide targeted training in finance, operations, governance, and strategic decision-making.
- Use committee assignments, officer succession conversations, and mentoring to prepare future board leaders.
- Convert the lower-scoring items into two or three concrete board development actions for the next year.
- Reinforce the strong culture around mission, attendance, conflicts, and follow-through.

These results point to a board that is functioning well and has a clear opportunity to move from strong participation to more intentional development, leadership preparation, and skill utilization.

How The Carter Firm Can Help

The Carter Firm helps organizations translate survey findings into practical governance improvement, strategic planning, and leadership development. Based on these results, The Carter Firm can provide tailored support to help your organization:

- Develop and implement strategic plans that align board work with mission, priorities, and measurable goals.
- Facilitate board development sessions focused on governance, finance, operations, and strategic decision-making.
- Build practical board dashboards and feedback loops that make progress easier to monitor.
- Create board skills inventories, leadership succession practices, and committee engagement plans.
- Support fundraising and community engagement strategies that fit the board's capacity and relationships.

We would be glad to discuss how we can help you strengthen board effectiveness and advance the mission.