

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. The aim was to gather insights from both individual participants (self) and the board members regarding various aspects of the organization's operations, including their understanding of the mission, general knowledge, agency knowledge, roles and responsibilities, and participation.

Methodology: The survey was distributed to all relevant stakeholders within the organization (N=14). Participants were asked to rate their own performance as well as that of the board across several key areas. The results were then compared against a benchmark average derived from 609 individual participants from similar organizations. This comparative analysis helps to identify strengths and areas for improvement.

Executive Summary

Key Findings:

High Performance in Understanding Mission: Both individual participants and the board demonstrated a strong understanding of the organization's mission and vision. The benchmark scores were 4.32 (Self) and 4.07 (Board), while the organization's scores were 4.89 (Self) and 4.89 (Board).

Proper Representation of Organization: Participants showed a solid ability to represent the organization. The benchmark scores were 4.12 (Self) and 3.91 (Board), while the organization's scores were 4.56 (Self) and 4.33 (Board).

General and Agency Knowledge: The survey highlighted a good level of general and agency-specific knowledge. For general knowledge, the benchmark scores were 4.14 (Self) and 3.87 (Board), and the organization's scores were 4.44 (Self) and 4.22 (Board). For agency knowledge, the benchmark scores were 3.89 (Self) and 3.65 (Board), and the organization's scores were 4.22 (Self) and 4.00 (Board).

Net Promoter Score (NPS): The NPS, which measures the likelihood of recommending serving on the board to others, was calculated as 60. This indicates a strong likelihood that members would recommend serving on this board, suggesting high satisfaction and a positive overall experience.

Overall Performance Highlights:

- The organization scored well above the benchmark in several areas, indicating strong engagement and understanding among both individuals and the board.
- Specific areas such as participation in fundraising and committee activities were noted as strengths, with participants demonstrating significant involvement and commitment.

Detailed Analysis

Mission and Strategy

Understands the Mission and Vision

- **Benchmark:** 4.32 (Self), 4.07 (Board)
- **Organization:** 4.89 (Self), 4.89 (Board)
- **Difference:** +0.57 (Self), +0.82 (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)

Active Role in Developing Annual Goals

- **Benchmark:** 3.79 (Self), 3.78 (Board)
- **Organization:** 4.44 (Self), 4.44 (Board)
- **Difference:** +0.65 (Self), +0.66 (Board)

Active Role in Developing Long-term Strategy

- **Benchmark:** 3.69 (Self), 3.70 (Board)
- **Organization:** 4.44 (Self), 4.44 (Board)
- **Difference:** +0.75 (Self), +0.74 (Board)

General Knowledge

Familiar with Non-Profit Challenges

- **Benchmark:** 4.14 (Self), 3.87 (Board)
- **Organization:** 4.44 (Self), 4.22 (Board)
- **Difference:** +0.30 (Self), +0.35 (Board)

Active in Charitable or Community Organizations

- **Benchmark:** 4.09 (Self), 3.74 (Board)
- **Organization:** 4.78 (Self), 4.67 (Board)
- **Difference:** +0.69 (Self), +0.93 (Board)

Utilization of Skills and Expertise

- **Benchmark:** 3.78 (Self), 3.49 (Board)
- **Organization:** 4.00 (Self), 4.11 (Board)
- **Difference:** +0.22 (Self), +0.62 (Board)

Agency Knowledge

Knowledge of Organization's Operations

- **Benchmark:** 3.89 (Self), 3.65 (Board)
- **Organization:** 4.22 (Self), 4.00 (Board)
- **Difference:** +0.33 (Self), +0.35 (Board)

Familiar with Financial Status

- **Benchmark:** 4.21 (Self), 3.99 (Board)
- **Organization:** 4.22 (Self), 4.11 (Board)
- **Difference:** +0.01 (Self), +0.12 (Board)

Experience and Skills

- **Benchmark:** 3.84 (Self), 3.92 (Board)
- **Organization:** 4.00 (Self), 4.11 (Board)
- **Difference:** +0.16 (Self), +0.19 (Board)

Informed about Important Issues

- **Benchmark:** 4.10 (Self), 4.00 (Board)
- **Organization:** 4.44 (Self), 4.22 (Board)
- **Difference:** +0.34 (Self), +0.22 (Board)

Roles and Responsibilities

Supports through Personal Contributions

- **Benchmark:** 4.18 (Self), 3.89 (Board)
- **Organization:** 4.56 (Self), 4.56 (Board)
- **Difference:** +0.38 (Self), +0.67 (Board)

Awareness of Roles and Responsibilities

- **Benchmark:** 4.24 (Self), 3.89 (Board)
- **Organization:** 4.44 (Self), 4.44 (Board)
- **Difference:** +0.20 (Self), +0.55 (Board)

Understanding of Role Differences

- **Benchmark:** 4.20 (Self), 3.80 (Board)
- **Organization:** 4.67 (Self), 4.44 (Board)
- **Difference:** +0.47 (Self), +0.64 (Board)

Roles and Responsibilities (Continued)

Avoiding Conflicts of Interest

- **Benchmark:** 4.37 (Self), 4.00 (Board)
- **Organization:** 4.89 (Self), 4.78 (Board)
- **Difference:** +0.52 (Self), +0.78 (Board)

Participation

Active Role in Fundraising

- **Benchmark:** 3.68 (Self), 3.55 (Board)
- **Organization:** 3.89 (Self), 4.13 (Board)
- **Difference:** +0.21 (Self), +0.58 (Board)

Participation in Committees

- **Benchmark:** 4.02 (Self), 3.76 (Board)
- **Organization:** 4.79 (Self), 4.56 (Board)
- **Difference:** +0.77 (Self), +0.80 (Board)

Support through Attendance

- **Benchmark:** 4.27 (Self), 3.89 (Board)
- **Organization:** 4.44 (Self), 4.00 (Board)
- **Difference:** +0.17 (Self), +0.11 (Board)

Follow-through on Commitments

- **Benchmark:** 4.20 (Self), 3.82 (Board)
- **Organization:** 4.67 (Self), 4.33 (Board)
- **Difference:** +0.47 (Self), +0.51 (Board)

Participation in Selecting Leadership

- **Benchmark:** 3.65 (Self), 3.66 (Board)
- **Organization:** 3.78 (Self), 3.89 (Board)
- **Difference:** +0.13 (Self), +0.23 (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?" Responses are categorized as follows:

- **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 10 (70%)
- **Passives:** 2 out of 10 (20%)
- **Detractors:** 1 out of 10 (10%)

$$NPS = 70\% - 10\% = 60$$

Analysis: The NPS of 60 indicates a high level of satisfaction and a strong likelihood of recommending serving on this board to others. The majority of respondents are promoters, reflecting positively on the overall board experience.

Comparative Analysis

- The organization performs well in understanding the mission and vision and representing the organization, with scores significantly higher than the benchmark.
- Areas for improvement include developing long-term strategy and familiarizing participants with the financial status of the organization.
- Board members generally rate their performance lower than individuals, suggesting a need for enhanced board engagement and training.

Recommendations

Enhance Board Engagement: Conduct regular training sessions to improve board members' understanding of their roles and responsibilities.

Improve Strategic Planning: Involve more participants in developing long-term strategies and annual goals to increase engagement and ownership.

Financial Literacy: Provide workshops to improve knowledge about the organization's financial status and challenges.

Conclusion and Next Steps

The survey results indicate that the Area Agency on Aging of Pasco-Pinellas has strong engagement and understanding among its members. There are areas for improvement, particularly in strategic planning and financial literacy. By addressing these areas, the organization can further enhance its effectiveness and impact.

Suggested Next Steps

To build on the strengths and address the areas for improvement identified in the survey, consider the following steps:

Financial Literacy: Provide workshops to improve knowledge about the organization's financial status and challenges. Enhanced financial literacy can empower board members and staff to make more informed decisions.

Improve Strategic Planning: Involve more participants in developing long-term strategies and annual goals to increase engagement and ownership. This collaborative approach can ensure that the organization's strategic plan is comprehensive and supported by all stakeholders.

How Vantage Associates Can Help

Vantage Associates has over 30 years of experience working with non-profits to enhance their strategic planning processes. Our team of experts can provide tailored support to help your organization:

- Develop and implement effective strategic plans that align with your mission and vision.
- Conduct comprehensive training sessions for board members and staff to enhance their skills and knowledge.
- Improve financial literacy through targeted workshops and training programs.
- Increase engagement in fundraising activities through innovative strategies and best practices.

Contact Us: To learn more about how Vantage Associates can support your organization, please visit our website, or contact us directly. We would be delighted to discuss how we can help you achieve your strategic goals and further your mission.

By partnering with Vantage Associates, you can leverage our extensive experience and proven methodologies to drive your organization's success.