

Community Impact Audit: Mid Year Strategic Review

A practical assessment tool for organizations to evaluate and strengthen their community engagement strategy

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BEFORE YOU BEGIN

- Designed for:** Organizations with big visions for community change - from corporations to nonprofits, social enterprises to credit unions and CDFIs
- Time Investment:** 20 - 30 minutes with your leadership team
- Best Timing:** Mid-year or quarterly review periods and in preparation for strategic planning
- Purpose:** Bridge the gap between your vision and reality through focused, strategic community engagement

GETTING THE MOST OUT OF THE ASSESSMENT

As an organizational leader, take this quiz to gain an understanding of where you stand.

- **Be honest in your assessment** - this tool is most valuable when you are realistic about where you truly are, not where you want to be.
- **Bonus Tip:** Ask employees at various levels of the organization to take this quiz and average the scores to get a 360 view of where your organization truly stands.

How to Score Each Section: For each area below, rate your organization on a 0-3 scale:

- **0 = Not in place** - We haven't started this or it's not happening
- **1 = Basic/Beginning** - We're just getting started or doing this inconsistently
- **2 = Well-developed** - We do this regularly and it's working well
- **3 = Excellent** - We excel at this and could teach others

Remember: Your organization creates change for the people it serves by being intentional and consistent. Change happens over time, through the day-to-day, small commitments and consistency that builds toward something bigger. Legacy is built over a lifetime.

SECTION 1: VISION & STRATEGIC FOCUS

1.1 From Vision to Reality

How clear is the connection between your big vision and your daily work?

- We have identified 1-2 specific community problems we are uniquely positioned to solve

Rate 0-3: _____
- Our community engagement activities directly connect to our organizational mission

Rate 0-3: _____
- We can clearly explain why we think our organization is equipped to address these specific issues

Rate 0-3: _____

NOTES

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- Leadership regularly discusses community impact alongside other organizational priorities

Rate 0-3: _____

- We have moved beyond "spreading ourselves thin" to focused, intentional community work

Rate 0-3: _____

SECTION SCORE

1.1 Score: _ / 15

1.2 Strategic Planning Integration

Does your organization’s strategic plan include clear community engagement priorities and goals, and incorporate a strategy for making an impact?

- We have a written plan for community engagement separate from operational planning

Rate 0-3: _____

- Community impact goals are integrated into our overall strategic planning process

Rate 0-3: _____

- We have a deliberate plan for creating social change with clear objectives

Rate 0-3: _____

- Our impact strategy addresses what we will, and will not, get involved in

Rate 0-3: _____

- We regularly review and adjust our community engagement strategy based on results

Rate 0-3: _____

SECTION SCORE

1.2 Score: _ / 15

SECTION 2: COMMUNITY KNOWLEDGE & RELATIONSHIPS

2.1 Community Knowledge & Relationships

Have you done your homework on the problems you’re trying to address?

- We have conducted conversations with at least 12 people impacted by the issues we address

Rate 0-3: _____

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- We talk to a broad range of people, including strangers and those outside our usual network

Rate 0-3: _____

- We approach these conversations with the perspective of LEARNING, not selling solutions

Rate 0-3: _____

- We ask both emotional questions (what gets you excited about) and practical questions

Rate 0-3: _____

- We document what we learn and use it to spot patterns and identify blind spots

Rate 0-3: _____

SECTION SCORE

2.1 Score: _ / 15

2.2 Partnership Development

What partnerships have you built, or community stakeholders have you spoken with throughout the year?

- We have active relationships with 3-5 community partners aligned with our mission

Rate 0-3: _____

- We invest in long-term relationships rather than transactional engagements

Rate 0-3: _____

- Community partners have input into our strategy and program design

Rate 0-3: _____

- We can name 4 or more key stakeholders and influential organizations (outside our industry) that come up multiple times in community conversations

Rate 0-3: _____

- We collaborate and share resources rather than just writing checks or showing up as sponsors

Rate 0-3: _____

SECTION SCORE

2.2 Score: _ / 15

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SECTION 3: MEASUREMENT & LEARNING

3.1 Tracking What Matters

Do your metrics measure the right thing?

“Everything has impact - even NOT being present somewhere has an effect. When you choose intentional social impact strategy or purpose work, you have taken the first step to making a difference.

- *Our metrics directly connect to the community impact we believe we can make and we can articulate how our goals ‘move the needle’ for our community.*

Rate 0-3: _____

- *We track both what we do (activities) and what changes as a result (outcomes)*

Rate 0-3: _____

- *We have baseline data to measure our progress against*

Rate 0-3: _____

- *We collect stories and feedback from the people we aim to serve*

Rate 0-3: _____

- *We use measurement data to make decisions about what’s working and what needs adjustment*

Rate 0-3: _____

SECTION SCORE

3.1 Score: _ / 15

3.2 Circumstances and Adaptation

What circumstances have changed since you wrote your plan?

- *We regularly assess external changes affecting our community and our work*

Rate 0-3: _____

- *We modify goals based on real life circumstances without throwing away good objectives*

Rate 0-3: _____

- *We seek feedback from community stakeholders about emerging needs and opportunities*

Rate 0-3: _____

- *We acknowledge obstacles that weren't anticipated and adjust accordingly*

Rate 0-3: _____

- *We can demonstrate concrete changes in our community as a result of our work*

Rate 0-3: _____

SECTION SCORE

3.2 Score: _ / 15

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SECTION 4: ORGANIZATIONAL CULTURE & CAPACITY

4.1 Team and Culture

Is your team built for high performance and community impact?

- All levels of our organization understand what we stand for and the values that drive us

Rate 0-3: _____

- The best ideas rise to the top through thoughtful communication across the organization

Rate 0-3: _____

- Hard conversations happen in a respectful way that builds trust

Rate 0-3: _____

- People collaborate, share resources, and feel supported by one another

Rate 0-3: _____

- We make decisions consistent with our mission and values, not just funding opportunities

Rate 0-3: _____

SECTION SCORE

4.1 Score: _ / 15

4.2 Capacity and Sustainability

Are you honest about your existing resources and capacity?

- We allocate sufficient staff time and budget specifically for community engagement

Rate 0-3: _____

- We avoid overstating our capacity to perform new projects or take on additional work

Rate 0-3: _____

- We have systems in place to support consistent community engagement efforts

Rate 0-3: _____

- Our team is not burned out or overextended from trying to do too much

Rate 0-3: _____

- We balance community impact investments with organizational sustainability

Rate 0-3: _____

SECTION SCORE

4.2 Score: _ / 15

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SECTION 5: FUTURE VISION & PREPARATION

5.1 Long-term Impact Vision

What is your big vision for community engagement?

- We have short-term (1 year), medium-term (3 year), and long-term (5+ year) community goals

Rate 0-3: _____

- We understand what our organization hopes to achieve around impact in each timeframe

Rate 0-3: _____

- We're building toward a big-picture vision for community change

Rate 0-3: _____

- We have identified long-term opportunities we want to be prepared for if they arise

Rate 0-3: _____

- Our long-term strategy helps us set appropriate priorities for how to spend our team's time

Rate 0-3: _____

SECTION SCORE

5.1 Score: _ / 15

5.2 Strategic Preparation

What can you do to set yourself up for a strong community engagement strategy next year?

- We regularly review what has gone well in our progress toward community impact

Rate 0-3: _____

- We take inventory of our resources and capacity for future opportunities

Rate 0-3: _____

- We're building the blocks of a community impact strategy that will show benefits over time

Rate 0-3: _____

- We have a framework for decisions around new opportunities and partnerships

Rate 0-3: _____

- We're prepared for fall strategic planning with clear direction for next year's goals

Rate 0-3: _____

SECTION SCORE

5.2 Score: _ / 15

Results: Mid Year Strategic Review

Core Assessment Total: _____ / 150

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SCORING GUIDE

Core Assessment (out of 150):

- 120-150: Excellent - You're operating at a high level with strong systems and clear impact
- 90-119: Good Progress - Solid foundation with 2-3 areas to strengthen
- 60-89: Building Phase - Key elements in place but need more systematic development
- 30-59: Development Stage - Foundation building required in multiple areas
- Under 30: Starting Point - Time to create your strategic framework

SECTION-BY-SECTION ANALYSIS

Look at your individual section scores (each out of 15) to identify your strongest and weakest areas:

Section	Your Score Status
Vision & Strategic Focus	_____ / 30
Community Knowledge & Relationships	_____ / 30
Measurement & Learning	_____ / 30
Organizational Culture & Capacity	_____ / 30
Future Vision & Preparation	_____ / 30

Section Performance Guide

- 12-15: Strong - maintain and optimize
- 9-11: Good - minor improvements needed
- 6-8: Developing - significant work required
- 0-5: Foundational - major development needed

How did you do?

Let's turn your results into a roadmap—schedule your next step with Profound Hope Industries.

Bonus: Book a Discovery Call with PHI and get our free Discussion Guide template to engage your team.