



Working Together for a Better World

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author ~ strategist
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www.NGOFutures.com
for tools and guidance

Through Strategy, Teamwork, and Leadership

I'll take you on a journey to new places

VIII. Competitor Assessment – A Detailed Planning Tool

Organization	
Address	
Web site	Phone
Key Contact Name/Title	
Mission	
Why do you call it a competitor? Is it a close competitor or 2nd level competitor?	
Program Services and Strategies	
Estimated Annual Budget or Revenues (Currency)	Year
Number of Employees	
____ <10 ____ 11-25 ____ 26-99 ____ 100-299 ____ 300 and more Trend ____	
Best Estimate of Revenue (%) from	
____ Grants and Contracts	____ Individuals
____ Corporations	____ Government
____ Foundations	____ Support from other countries
____ Sales	____ Other (describe)

VIII. Competitor Assessment: Worksheets for Strategic Planning

Major Contributors (list)	
Trends results over the past few years / Comments	
Types of Marketing/PR used	
<input type="checkbox"/> Proposals	<input type="checkbox"/> Brochures and Annual Reports
<input type="checkbox"/> Paid Advertising or Direct Mail	<input type="checkbox"/> Fundraising/Marketing Staff
<input type="checkbox"/> Conferences	<input type="checkbox"/> Media
<input type="checkbox"/> Fundraising Events	<input type="checkbox"/> Other (describe)
Comments:	
What does it do in advocacy or policy? What is its strategy for this? How successful is it?	
Strengths: What Can We Learn From This Organization?	

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Weaknesses: What Should We Avoid That This Organization Does?	
Recommendations for Partnering	
Recommendations for Setting New Benchmarks for Us to Achieve	
Additional Comments/Observations	
Person Completing Survey Form	Date