

Preparing a Missional Spending Plan Step by Step

- Step # 1 Develop a Vision and Mission Statement**
Leaders should review the purpose and direction of ministry each year. Every five to seven years the vision and mission should be renewed or revised. This may include values and long term goals.
- Step # 2 Define activities for coming year**
Each committee, task group or team should review their purpose and achievements for the past year. Based on the direction, specific areas of focus for the coming year(s) and goals or objectives can be defined.
- Step # 3 Connect activities to Vision and Mission of Congregation**
Communicate planned activities with leadership group and other teams, committees, task groups and committees who may partner or be affected.
- Step # 4 Determine the investment of ministry dollars for each activity**
Estimate the cost of the specific activities planned for the coming year.
- Step # 5 Determine the investment in staff support for each activity**
Estimate the time necessary by support staff to administer, facilitate or lead each activity. It is helpful to estimate the number of volunteer hours.
- Step # 6 Determine other investments made in each activity**
Estimate the cost of materials, supplies and other items necessary to carry out the activities. This includes space in the facility, printing, postage, etc.
- Step # 7 Determine cost factors for spaces used in building**
The Finance Committee can develop a cost factor for hourly use of each room of the church property. This should include allocation of mortgage, utilities, maintenance and other building expenses. See worksheet.
- Step # 8 Determine cost allocation of overhead and shared expenses**
The Finance Committee can develop a cost factor to reflect administrative and miscellaneous expenses. This would include secretarial and custodial services. These costs should be kept a minimum.
- Step #9 Summarize dollar cost for each committee, task group or team**
The Finance Committee can add together the allocation of staff time, investments in activities, space costs and administrative costs together for each committee, task group or team.
- Step #10 Allocate costs to areas of ministry focus or goals**
The Finance Committee can allocate the investment dollars and costs to the primary goals and focus for the coming year. This may be specific ministries such as worship, education and outreach or functional areas like faith formation, service or spiritual growth.