

# Template Training Tuesday: Spending Plan (Budget)



20 April 2021



GARY HOAG



MATTHEW GADSDEN



MARK WHITSITT



# Overview

- 1. Welcome**
- 2. What is a Spending Plan (Budget)?**
- 3. Why should God's workers use it?**
- 4. How can you adapt it to your organization?**
- 5. What if you used it? (Testimony)**
- 6. Q & A**
- 7. Wrap-up**



# What is a Spending Plan (Budget)?

A budget is a spending plan to "put to work" what God supplies to a church or ministry with purpose, faithfulness, and accountability (see Luke 19:13).

**GTP Spending Plan (Budget)**  
Year-Year  
Please use only numbers

	June	July	August	September	October	November	December	January	February	March	April	May	June	TOTAL	% of Total
<b>INCOME</b>															
Partner Income - Individuals															
Foundation Income - Individuals															
Foundation Income - Institutions															
Restricted Grants															
<b>TOTAL INCOME</b>															
<b>EXPENSES</b>															
<b>Staff Compensation</b>															
CEO	100%														
CPD & Strategy Catalyst	100%														
VP of Training & Equipment	100%	100%													
VP of Partnership & Communications	100%														
Global Administrator	100%														
Payroll Taxes, & (17.65%)	100%	100%													
<b>Staff Travel</b>															
CEO	100%	50%	20%												
CPD & Strategy Catalyst	100%														
VP of Training & Equipment	100%														
VP of Partnership & Communications	100%														
Global Administrator	100%														
<b>Regional Activities</b>															
Regional Events	100%	50%	50%												
Regional Facilities / Board Travel	100%														
Annual Staff Retreat	100%														
Global Gathering	100%														
Meals & Transportation	100%	20%	75%												
Meeting Grants	100%														
<b>General &amp; Administrative</b>															
Equipment	100%														
Stationery & Postage	100%														
Subscription and Software Fees	100%														
Office and General Expenses	100%														
Auto & Gas Mileage	100%														
Insurance	100%														
Legal	100%														
Contracted Bookkeeping/Admin	100%														
Professional Services	100%														
<b>TOTAL EXPENSES</b>															
<b>SURPLUS / (DEFICIT)</b>															
<b>INVESTMENT BY PROGRAM</b>															
Training															
Travel															
Transportation															
Utilities															



# What is a Spending Plan (Budget)?

Spreadsheet that presents the stewardship of revenue and expenses in keeping with the purpose of a church or ministry over a set period of time.

## Types of Revenues / Income

- Gifts (individuals, foundations, etc)
- Service / Products (tuition, certification, etc)
- Sale of Resources (books, materials, etc)



# What is a Spending Plan (Budget)?

Spreadsheet that presents the stewardship of revenue and expenses in keeping with the purpose of a church or ministry over a set period of time.

## Expenses / Spending

- Salaries (staff, contract labor, development, etc)
- Travel and Activities (events, projects, etc)
- General and Administrative (office, legal, web, bookkeeper, auditor, insurance, etc)



# What is a Spending Plan (Budget)?

- **A guide for a path forward with operations, not a set of limitations to bind God's works.**
- **It can be for the overall spending of church or ministry, and it can be for a specific project.**
- **It is a map of priorities; does the church or ministry have an outward or inward focus?**
- **It is reflection of the past, aspirations for the next season, or a hybrid of both.**



# Why should God's workers use it?

**Spending Plan to "Put to Work" what God supplies**

- **Purpose (Before) - Forecast of how funds will be used which also helps raise funds (e.g., USA)**
- **Faithfulness (During) - Monthly financials show faithfulness and grow trust (e.g., Philippines)**
- **Accountability (After) - Budget prepared you to give an account (e.g., Kenya)**

**Luke 16:2 - "Give an account of your stewardship"**



# **Why should God's workers use it?**

- **Shows stakeholders that the church or ministry takes care to use resources responsibly.**
- **Demonstrates the value of the various roles to committees and program directors.**
- **Positions the board to reflect on what God has entrusted to the church or ministry.**
- **It frees staff to focus on their calling and not about what will happen in the next season.**





# How can you adapt it to your organization?

Let's look at the the budget template and show how you can adapt it to your organization in only a few minutes (see Matt. 6:25-27).

**GTP Spending Plan (Budget)**  
Year-Year  
Please use only integers

	June	July	August	September	October	November	December	January	February	March	April	May	June	TOTAL	% of Total
<b>INCOME</b>															
Partner Income - Individuals															
Foundation Income - Individuals															
Foundation Income - Institutions															
Restricted Grants															
<b>TOTAL INCOME</b>															
<b>EXPENSES</b>															
<b>Staff Compensation</b>															
CEO	100%														
CEO & Strategy Counsel	100%														
VP of Training & Equipment	100%	100%													
VP of Partnership & Communications	100%														
Global Administrator	100%														
Payroll Taxes, & (17.65%)	100%	100%													
<b>Staff Travel</b>															
CEO	100%	50%	20%												
CEO & Strategy Counsel	100%														
VP of Training & Equipment	100%														
VP of Partnership & Communications	100%														
Global Administrator	100%														
<b>Regional Activities</b>															
Regional Events	100%	50%	50%												
Regional Facilities / Board Travel	100%														
Annual Staff Retreat	100%														
Global Gathering	100%														
Meals & Transportation	100%	20%	75%												
Meeting Grants	100%														
<b>General &amp; Administrative</b>															
Equipment	100%														
Custom Design & Print	100%														
Subscription and Software Fees	100%														
Office and General Expenses	100%														
Audit & CPA Membership	100%														
Insurance	100%														
Legal	100%														
Contracted Bookkeeper/Admin	100%														
Professional Services	100%														
<b>TOTAL EXPENSES</b>															
<b>SURPLUS (DEFICIT)</b>															
<b>INVESTMENT BY PROGRAM</b>															
Training															
Travel															
Personnel															
Facilities															



# What if you used the Spending Plan (Budget)?

What outcomes can  
your church or  
ministry anticipate?



**MARK WHITSITT**  
GTP Board Member



# Questions & Answers



**GARY HOAG**  
GTP President & CEO



**MATTHEW GADSDEN**  
GTP CFO & Strategy  
Catalyst



**MARK WHITSITT**  
GTP Board Member

# Next Template Training Tuesday...

**27 April 2021**  
**12 noon GMT**

**QUARTERLY & ANNUAL  
REPORTS**



**ERENY MONIR**



**PAULA MENDOZA**



**GREGG CAPIN**



**Email inquiries and send impact stories to [mail@gtp.org](mailto:mail@gtp.org).**



**[gtp.org](http://gtp.org)**



**[/GlobalTrustPartners](https://www.facebook.com/GlobalTrustPartners)**



**[/company/globaltrustpartners](https://www.linkedin.com/company/globaltrustpartners)**