

Transition Budget Worksheet

This budget assumes a 12 (twelve) month transition and has been designed to serve churches of all sizes. It assumes expenses at their highest potential to prepare for the maximum budget, if needed. To utilize the budget tool use the detail column to calculate your projected expenses. Then insert them in the chart below by replacing the zero figures in the monthly columns (shaded green) with your own estimation. If you do not plan for a specific expense, leave the amount at "0". The sheet will then automatically calculate your total budget for the 12 month period, as well as tally all the categories for a total projection of transition expenses. The total will then help your team raise funds for a transition fund to offset expenses. The cells that do automatic calculations (shaded red) have been locked to make using this resource easier for those who might be unfamiliar with Microsoft Excel. If you want to change the function of locked cells the password is "riseup". Go to Cells > Format > Protection. It is recommended to relock the sheet when finished.

Stage	Description	Detail	Monthly	12-Month Total	Total Stage Cost
0	FAREWELL EXPENSES*	<i>*(these will calculate as one time expenses)</i>			
	Severance pay	Severance is paid if terminated	\$0	\$0	
	Monetary gift from General Fund or continuance of pay past last day.	Usually for exceptional service, effectiveness or longevity. See manual for suggestions.	\$0	\$0	
	Unused vacation time	Unused vacation time as of last day	\$0	\$0	
	Farewell events	Banquet, farewell service or send off	\$0	\$0	
	Outstanding reimbursements	Board approved reimbursables with receipts	\$0	\$0	
	Total Farewell Expenses		\$0	\$0	\$0
0	INTERIM PASTOR COSTS				
	Monthly honorarium. This figure assumes the fifth role (Interim Executive Leadership) described in paragraph E, "Various Capacities of an Interim Pastor" in the chapter entitled "Interim Pastor."	Estimates based on twelve months of service consisting of 4 days in the office each week, preaching two services on Sunday, staff and board meetings, and pastoral care. That would include everything, with the exception of food and lodging. It should also be noted that the church would not be paying a lead pastor's salary.	\$0	\$0	
	Lodging expenses	Sunday through Wednesday (\$?? a night)	\$0	\$0	
	Food expenses		\$0	\$0	
	Total Interim Pastor Costs		\$0	\$0	\$0
1	PRE-SEARCH PREPARATION				
	Sustainability letter of invitation and sheets with daily prayer focus	Three pieces of paper, envelope, and postage	\$0	\$0	
	Board or search committee retreat at hotel or bed and breakfast*	1 night retreat with 2 dinners, 1 breakfast, 1 lunch, meeting space for 2 days, beverage service, and private rooms: \$?? per guest (plus tax)	\$0	\$0	
	Total Stage 1 Costs		\$0	\$0	\$0

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2	ADVERTISING THE OPENING				
	Online posting fees for 4 months at a time	Costs for services mentioned in the appendix entitled "Advertising the Ministry Opening"	\$0	\$0	
	Total Stage 2 Costs		\$0	\$0	\$0
3	SEEK COUNSEL FROM NETWORK LEADERSHIP/CONGREGATION				
	Inviting network superintendent to come to the church board meeting for advice.*	Honorarium (\$??) and reimburse lodging (\$??) and meals (\$??)	\$0	\$0	
	Letter to church informing them of online survey and questions.*	Letters at 73 cents each (envelopes and postage) \$?	\$0	\$0	
	Total Stage 3 Costs		\$0	\$0	\$0
4	TARGETING POTENTIAL CANDIDATES				
	Weekly pulpit committee meetings	Perhaps one confidential meeting a month offsite at a rented conference center (\$?? an hour for small room; \$?? an hour for large room)	\$0	\$0	
	Refreshments each week	Refreshments for weekly meetings	\$0	\$0	
	Total Stage 4 Costs		\$0	\$0	\$0
9	CONTEXTUAL VISIT	Three people making two trips to see top two candidates in their own setting.			
	Airfare	Projections made using expedia.com with reservations made two weeks ahead of time. Round trip for two committee members flying from your location to a 10-city average. Three trips to visit the churches of the top 3 candidates.	\$0	\$0	
	Lodging	Two separate rooms	\$0	\$0	
	Meals		\$0	\$0	
	Car Rental/Miscellaneous		\$0	\$0	
	Update letter to church	Letters at 73 cents each (envelopes and postage) \$?	\$0	\$0	
	Total Stage 9 Costs		\$0	\$0	\$0
10	3 PERSONAL INTERVIEWS				
	Airfare	Projections made using expedia.com with reservations made two weeks ahead of time. Three (top three candidates) round trip tickets for two people (candidate and spouse) flying to your location from a 10-city average. Three trips to interview each of the top three candidates.	\$0	\$0	
	Lodging	One room	\$0	\$0	
	Meals		\$0	\$0	
	Miscellaneous		\$0	\$0	

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	Car rental	Three car rentals averaging \$?? each	\$0	\$0	
	Letter to church updating them on the process	Letters at 73 cents each (envelopes and postage) \$?	\$0	\$0	
	Total Stage 10 Costs		\$0	\$0	\$0
11	OFFICIAL CANDIDACY	Bring back candidate to be voted upon			
	Airfare	Projections made using expedia.com with reservations made two weeks ahead of time. Round trip tickets for candidate, spouse and up to four children flying to your location from a 10-city average.	\$0	\$0	
	Lodging	Two adjoining rooms for entire family	\$0	\$0	
	Meals		\$0	\$0	
	Miscellaneous		\$0	\$0	
	Car rental	Family size car rental averaging \$? weekly rental	\$0	\$0	
	Business meeting announcements	Letter to the membership announcing the selection of a candidate and the day and time of the business meeting vote. Letters at 73 cents each (envelopes and postage) \$?	\$0	\$0	
	Total Stage 11 costs		\$0	\$0	\$0
12	PREPARING FOR NEW PASTOR				
	Moving expenses	Projection made assuming a moving company is used and moving from the farthest point east or west.	\$0	\$0	
	New laptop	Apple/PC products for consistency with office set up.	\$0	\$0	
	New phone	Apple iPhone/Android phone	\$0	\$0	
	First month's deposit	In the event the candidate is a young family and unable to immediately transition into higher housing costs.	\$0	\$0	
	Welcome expenses	Welcome banquet, basket or gifts	\$0	\$0	
	Total Stage 12 costs		\$0	\$0	\$0
	TOTAL TRANSITION EXPENSES			\$0	\$0