

True Cost Worksheet

Fill this in once for each platform you are considering. The whole point is to reach a single annual number you can compare fairly, rather than comparing advertised monthly prices that are not measuring the same thing.

1 Step 1: establish your own numbers first

- ☐ 1 Current member count, and your expected count in two years.
- ☐ 2 Number of admins who need their own login.
- ☐ 3 Annual payment volume: dues + event tickets + donations + program fees.
- ☐ 4 Number of email contacts you send to.
- ☐ 5 Number of events per year, and how many are paid.
- ☐ 6 Do this before you look at any pricing page, so the numbers are honest.

2 Step 2: the subscription

- ☐ 7 Base plan price for your member count, billed annually.
- ☐ 8 Check whether the advertised price is the monthly or the annual-billed rate.
- ☐ 9 Check what happens when you cross the next member tier.
- ☐ 10 Note whether an annual commitment is required to get the advertised rate.

3 Step 3: transaction fees (usually the biggest number)

- ☐ 11 Platform percentage on dues and memberships.
- ☐ 12 Platform percentage on event tickets.
- ☐ 13 Platform percentage on donations, check whether nonprofits are treated differently.
- ☐ 14 Confirm whether the platform fee is charged before or on top of card processing.
- ☐ 15 Multiply each percentage by your actual annual volume in that category. Write the dollar amount, not the percentage.

4 Step 4: add-ons you would actually need

- ☐ 16 Custom member or profile fields.
- ☐ 17 Branded or custom-domain email notifications.
- ☐ 18 Extra admin seats beyond the included count.
- ☐ 19 Email sending beyond the included contact limit.
- ☐ 20 Extra groups, spaces, or directories.
- ☐ 21 A branded mobile app, if you want one, check whether it requires an enterprise plan.
- ☐ 22 Add these to the annual total. This is where advertised prices most often double.

5 Step 5: one-time and hidden costs

- ☐ 23 Setup or onboarding fee. If pricing is quote-only, assume one exists and ask directly.
- ☐ 24 Data migration or import assistance.
- ☐ 25 Training, if it is not included.
- ☐ 26 Website design or template fees, if the platform hosts your site.
- ☐ 27 Ask in writing what the renewal price will be and how much notice you get before a change.

6 Step 6: the tools you would still be paying for

- ☐ 28 List every tool you use today: email, ticketing, website, directory, payments, spreadsheets.
- ☐ 29 Mark which ones this platform genuinely replaces.
- ☐ 30 Add the annual cost of every tool you would keep.
- ☐ 31 A platform that replaces four tools at a higher price can be cheaper than one that replaces one at a lower price.

7 Step 7: the total, and the questions

- ☐ 32 Add steps 2 through 6 into one annual number per platform.

- ☐ **33** Redo the calculation at twice your current member count and payment volume.
 - ☐ **34** Ask each vendor, in writing: total annual cost at our size, all fees included.
 - ☐ **35** Ask: what percentage on dues, tickets, and donations, before or after processing?
 - ☐ **36** Ask: is there a setup fee, and what is it?
 - ☐ **37** Ask: what happens at renewal, and what notice do we get?
 - ☐ **38** A vendor who will not answer these in writing has told you something worth knowing.
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