Tithely

BUYER'S CHECKLIST

How to Choose Church Management Software

Sixty-four checks across features, pricing, migration, and support, plus a weighted scorecard for ranking your shortlist.

WHAT'S INSIDE

How to use it: tick the boxes on screen or print it for your team. Anything you cannot confirm in a demo is a question for the vendor, not an assumption.

Adapted from the full guide, which explains the reasoning behind every check:
get.tithe.ly/blog/how-to-choose-church-management-software

START HERE

Define your requirements

Write these down before you take a single demo. Every vendor's demo is designed to make their strengths look like your requirements.

1. **Attendance and membership count**
   Current, not aspirational. The biggest driver of price.
2. **How many people need logins**
   Staff, volunteer coordinators, group leaders, check-in team.
3. **What you're replacing**
   A spreadsheet, a legacy system, or four disconnected tools.
4. **The one workflow that must work**
   Check-in, volunteer scheduling, contribution statements. Pick one.
5. **Who owns it after launch**
   Software without an internal owner reverts to spreadsheets.

PART 1

The feature checklist

Group your requirements by function, not by vendor feature list. Anything you cannot confirm in a demo is a question for the vendor.

01 People, records, and directory

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The member database is the foundation. Everything else reads from it.

- [ ] Unlimited people records with no per-contact charge
- [ ] Custom fields for the things your church actually tracks
- [ ] Household and family grouping, not just individuals
- [ ] Duplicate detection and merge tools
- [ ] Notes with permission controls, so pastoral notes aren't visible to every volunteer
- [ ] A member-facing directory that updates itself

NOTES ON PEOPLE AND RECORDS

PART 1

The feature checklist, continued

02 Attendance and check-in 6

The highest-stakes weekly workflow, and the one most likely to expose a weak system.

- [ ] Kids check-in with matching security tags
- [ ] Self-service kiosk mode plus a staffed station option
- [ ] Offline mode, because check-in must survive a Wi-Fi drop
- [ ] Allergy and authorized-pickup flags visible at check-in
- [ ] Attendance recorded from check-in automatically, not typed in later
- [ ] Service, group, and event attendance in one report

03 Groups and volunteers 5

- [ ] Group directory members can browse and join themselves
- [ ] Group leaders can take attendance without a full admin login
- [ ] Volunteer roles with qualifications and background-check status
- [ ] Scheduling with conflict detection and automated reminders
- [ ] Serving history per person, so you can see who is over-scheduled

04 Events and registration 5

- [ ] Registration forms with payment collection
- [ ] Capacity limits and waitlists
- [ ] Per-attendee custom questions
- [ ] Registrations flow into the same people database, with no CSV round-trip
- [ ] Event check-in reuses the same check-in system

PART 1

The feature checklist, continued

05 Communication

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- ☐ Email and SMS from the same contact records
- ☐ Segmentation by tag, group, attendance, or giving behavior
- ☐ Two-way texting, since one-way blast tools generate more work, not less
- ☐ Push notifications if you have a church app
- ☐ Automated follow-up sequences for first-time guests

06 Giving and finances

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Where the system meets money, integration matters more than features.

- ☐ Giving records tied to the same person record as attendance and groups
- ☐ Recurring giving, text giving, and in-person options
- ☐ Contribution statements generated in-platform
- ☐ Fund accounting and designated-fund tracking
- ☐ Accounting integration (QuickBooks or equivalent)
- ☐ Reporting a treasurer can run without asking staff

07 Reporting

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- ☐ Reports you can build yourself without a support ticket
- ☐ Engagement views that combine attendance, giving, and serving
- ☐ Export to CSV. Always confirm you can get your data out
- ☐ Trend reporting over time, not just point-in-time snapshots

FEATURE GAPS TO FOLLOW UP ON

PART 2

Pricing models

Four models dominate this category and they behave very differently as you grow: **flat rate** (one price, all modules), **tiered by church size**, **per user**, and **modular add-ons**. Price the full stack you need at your size, then multiply by 36 months.

01 Ask every vendor

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- [ ] What is the total annual cost at our size, with every module we listed?
- [ ] What triggers a price increase: user count, member count, or attendance?
- [ ] What are the payment processing rates, separately from the software fee? (Tithely publishes 2.9% + $0.30 for credit/debit, 1% + $0.30 for ACH, and 3.5% + $0.30 for AMEX.)
- [ ] Is there a setup, onboarding, or migration fee?
- [ ] Is there a contract, and what is the cancellation term?
- [ ] What happens to our data if we leave?
- [ ] Is text messaging metered, and what is the per-message cost past the included allowance?

The trap: per-user and modular pricing look cheapest in month one and are frequently the most expensive by year three. Model it at the number of logins you will actually have in two years, not today.

PART 3

Migration

Migration is where most switches go wrong, and the step almost no buyer scores.

01 Before you sign

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- [ ] Confirm exactly what the vendor migrates: people, households, giving history, attendance history, groups, notes, custom fields
- [ ] Confirm what they don't migrate. Giving history and pastoral notes are the two most common exclusions
- [ ] Get the migration timeline in writing
- [ ] Ask whether migration is included or billed separately (Tithely includes data migration and onboarding with All-Access)
- [ ] Ask who does the work: you, them, or a paid third party

PRICING QUOTES AND MIGRATION TERMS

PART 3

Migration, continued

02 Before you migrate 4

- [ ] Clean your data first. Migrating a messy database produces a messy database in a nicer interface. [Church data management](https://get.tithe.ly/blog/church-data-management) covers the audit.
- [ ] Export a full backup of the old system and store it somewhere you control
- [ ] Decide your cutoff date for historical giving. Most churches carry three to seven years
- [ ] Identify the fields with no equivalent in the new system, and decide now where they go

03 During and after 4

- [ ] Run both systems in parallel through at least one full giving cycle and one full Sunday
- [ ] Reconcile giving totals between systems before you turn the old one off
- [ ] Verify a sample of member records field by field, not just the record count
- [ ] Confirm contribution statements generate correctly before January

Timing: migrating in December, during year-end giving and statement season, is the most common self-inflicted wound in this category.

PART 4

Support and onboarding

01 Ask every vendor 7

- [ ] What are actual support hours, in your time zone?
- [ ] Which channels (phone, chat, email), and what are typical response times?
- [ ] Is support included, or is there a paid tier?
- [ ] What does onboarding include, and how long does it last?
- [ ] Is there live training for staff and volunteers, or only documentation?
- [ ] Is there a searchable help center and an active user community?
- [ ] Is there a public product roadmap or release log?

Two live tests: submit a real support ticket during your trial and time the response, and ask for two reference churches of your size who switched in the last year. Ask them about migration and support, not features.

SUPPORT TEST RESULTS

PART 5

Score your shortlist

Do not rank vendors by feature count. Weight the categories by what will actually break your church, then score each vendor 1 to 5.

Category	Weight	Vendor A	Vendor B	Vendor C
The one workflow that must work	25%			
Core features (people, check-in, giving)	20%			
Total 3-year cost at your size	20%			
Migration risk	15%			
Support and onboarding	10%			
Ease of use for volunteers	10%			
Weighted total				

RULE 1

Any vendor scoring 1 or 2 on **the one workflow that must work** is out, regardless of total.

RULE 2

Score **total three-year cost**, not monthly price. The cheapest month-one option is frequently the most expensive by year three.

Tithely

Test it with your own data, not a demo dataset

A 30-day trial with your real records tells you more than any demo. Tithely's all-in-one platform includes giving, people, check-in, groups, volunteers, events, communication, website, and app, with data migration and onboarding included.

Start a free 30-day trial →

Prefer to read first? The full guide is at **get.tithe.ly/blog/how-to-choose-church-management-software**