State of Associations Quarterly: 2024 Q1

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Key findings

- **58 percent of renewing members pay within 15 days of their invoice date**, regardless of organization size.
- Organizations that bill on a single annual renewal date collect payment faster than those that bill on each member's join anniversary: a median of 12 days to first payment versus 21 days.
- The slowest-paying month is January, when invoice volume is highest across the sample and staff report the most manual follow-up.
- Late payment does not predict non-renewal. Most of the members who eventually renew at the annual rate of 93 percent pay late at least once during the year.

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Why renewal timing, and why now

State of Associations 2024, due out in March, will report the sector's headline growth and renewal numbers. This brief exists because those two figures, useful as they are, don't tell membership staff anything about the mechanics of collecting the money — when it actually arrives, and what predicts a slow payer versus a lost one.

NANA's research team pulled early responses to the same benchmarking survey behind the annual report, isolating a question the full report doesn't dwell on: for members who eventually renew, how many days pass between the invoice going out and the payment coming in.

What the data shows

Across the responding organizations, 58 percent of renewing members pay within 15 days of receiving an invoice. Another 27 percent pay between 16 and 45 days. The remaining 15 percent

pay after 45 days, often after at least one reminder from staff.

Organization size doesn't predict which bucket a member falls into. A 40-staff national federation and a two-person state chapter show nearly identical payment-timing curves. What predicts timing is billing structure.

Single-date billing versus anniversary billing

Associations that bill all members on a single annual date see faster median payment: 12 days from invoice to first payment. Associations that bill each member on their own join anniversary see a median of 21 days.

Director of Research Inês Carvalho-Reyes said the gap likely comes down to visibility rather than member behavior. "When every member gets an invoice on the same date, staff can run one campaign, one set of reminders, one deadline everyone can see coming. Anniversary billing spreads that attention thin. Nobody's watching January 14th as closely as everyone watches January 1st."

The January bottleneck

January carries the highest invoice volume in the sample, both because it's the most common single billing date and because it's the start of the calendar year for organizations that align dues with their fiscal year. Staff at organizations using single-date billing reported the heaviest manual follow-up load in January, even though payment arrives faster on average than under anniversary billing.

The brief's respondents who reported the least January strain had one thing in common: an automated first reminder sent five to seven days before the invoice date, rather than after it.

Late payment is not a warning sign — mostly

A late-paying member is not, on this data, a member at risk of not renewing. Most of the members who make up the sector's 93 percent annual renewal rate pay late at least once during a given year. Staff who treat every late payment as a churn signal may be spending outreach effort on members who were always going to renew, just not on schedule.

The exception the data does support: members who pay later than 45 days two years running renew at a meaningfully lower rate than members who are late once and then early the next year. A single late payment is normal. A pattern is worth a call.

Regional and sector notes

The early responses this brief draws on don't yet support a full regional breakdown — that will wait for the complete State of Associations 2024 sample in March — but a preliminary pass across NANA's six chapter regions shows no obvious outlier. Payment timing in the Mid-Atlantic and Great Lakes regions, the two best-represented in the early responses, tracks within a few days of each other on both billing structures.

Sector shows more spread than region in this preliminary look. Health care and education associations, both reporting higher membership growth in early responses, also show slightly faster median payment than the sample as a whole, though the gap is small enough that the research team isn't ready to call it a pattern rather than noise in a partial sample.

What to change before your next cycle

Three changes showed up repeatedly among the fastest-collecting organizations in the sample:

- Send a reminder before the invoice date, not only after it
- Put the renewal deadline on the invoice itself, not only in a follow-up email
- If billing on anniversary dates, build a monthly (not annual) reminder cadence, since no single date carries the same organizational attention

None of these require new software or a new billing cycle. They're calendar changes, and the organizations in this sample that made them saw first-payment timing shift by a week or more within a single renewal cycle — a meaningful improvement for membership staff carrying a manual follow-up load through January.

The research team will report the full-sample regional and sector breakdown once State of Associations 2024 is complete, and will flag here whether the preliminary pattern holds.