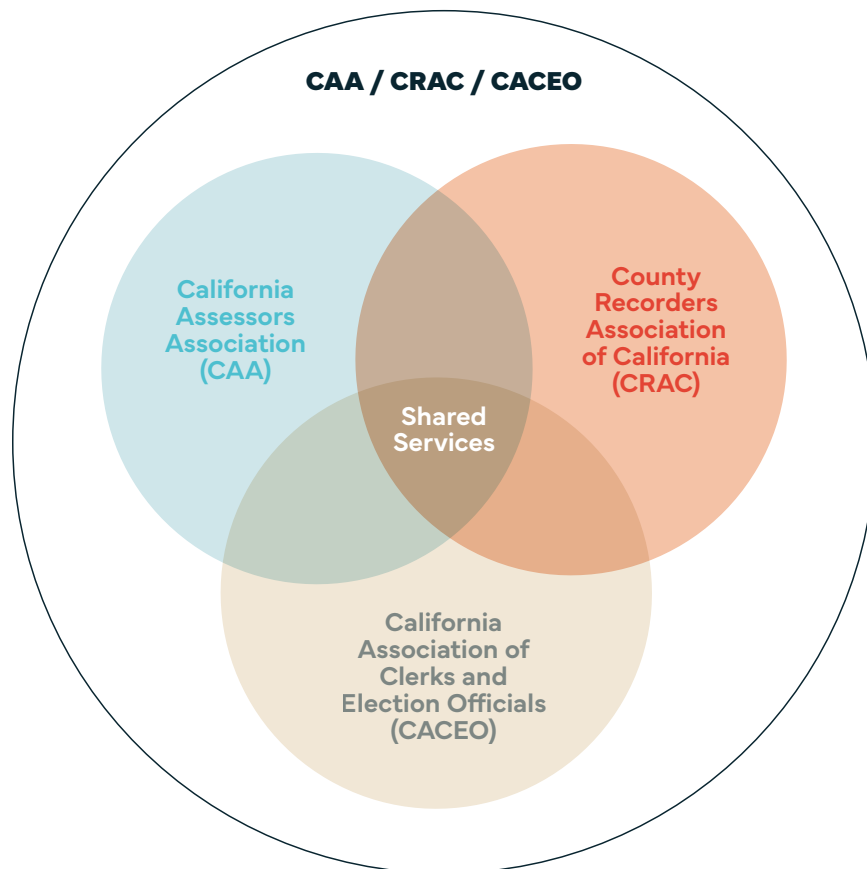


# A Shared Services Governance Model

## How Three California Associations Built a Shared Administrative Support Structure



### Introduction

In California, three local government associations came together in 2024 and 2025 to form a new, shared services governance model, a first of its kind. The California Association of Clerks and Election Officials (CACEO), County Recorders Association of California (CRAC), and California Assessors' Association (CAA) decided that a shared administrative and operational services model made the most sense financially, operationally, and logistically for their three associations. This case study outlines the process of adopting this model and the lessons learned by association leadership throughout the process. The Coalition for Election Association Leaders (CEAL), a project of Election Center, shares this in the hope that other associations can benefit from the innovation, collaboration, and execution of the California associations.

When Jesse Salinas assumed the presidency of CACEO in July 2024, he knew there was a need to reimagine the governance model for all three associations. Each association faced unique challenges — reliance on a volunteer-only model amid increasingly complex, time-intensive jobs with many responsibilities, unplanned retirements, increasing costs, and a desire for a stronger, more broad-based collection of member representative voices to advocate for its organizational needs. These challenges led to a desire to professionalize and strengthen each association’s functionality. Since memberships overlap substantially, it made sense to explore the strengthening of each association as a cohort.

While this model was developed in California, the challenges it addresses are not unique to one state. Associations across the country are navigating increasing operational complexity, leadership turnover, decreasing bandwidth, and growing expectations for advocacy and compliance. The shared services approach offers one example of how associations can strengthen governance capacity without sacrificing independence.

## Adopting a New Governance Model

The process began with identifying key contributors and surveying the landscape. Several individuals are members of two or more of the three associations, and many were consulted to gauge the associations’ interests and needs. Once the key players were identified, Jesse Salinas, CACEO’s president, formed an exploratory committee and appointed Natalie Adona, CACEO’s secretary, and Dean Logan, the current president of CRAC and former CACEO president, to lead the effort. The association presidents, alongside key principal members from each organization, spent months building buy-in and created an initial document that framed the effort’s needs, desires, and trajectory.

This initial framing document became the basis for a visioning session. Each association’s leadership board held a separate vote to authorize and fund participation in the session, ensuring that the decision reflected the independent governance of each organization and their commitment to making improvements collaboratively. By requiring formal approval and financial contribution from all three associations, the process reinforced shared ownership and demonstrated that each board had meaningful investment, both financially and strategically, in exploring the model.

All three boards voted to approve the budget for the visioning session held in May 2025. The cost of the visioning session was \$18,000, split between the three associations. Because all three associations participate in a leadership training program through the University of California, Davis (UC Davis), a UC Davis instructor facilitated the visioning session. CEAL’s director, Pam Anderson, who served as executive director of the Colorado County Clerks Association for five years, participated in the visioning session to support discussions on governance, strategy, and operational needs.

## The Benefits of a Shared Services Model

After the visioning session, it became clear that pursuing a shared service model would benefit each association. A shared services model would increase each association board's ability to oversee organizational governance and invest in proactive strategic planning and operational policies. Smaller counties would be provided more opportunities to participate in association efforts. The risk of future lapses in fiduciary obligations would be lessened. Members, vendors, and subcontractors would have a more consistent point of contact and more consistent accounts management. The new model would also reduce the need for member volunteers to spend their time doing administrative and operational tasks. Website and mailing list maintenance and administration would be improved. The collaboration between associations would be solidified. The professionalization of the associations would be enhanced.

Each of the three associations held a second vote to fund legal counsel and to issue a request for proposals (RFP) for an association management firm. The vote passed, and legal counsel was retained to draft and finalize the RFP. A committee comprised of one appointed member from each association was formed and tasked with creating a joint RFP. The final RFP is in Appendix A.

The committee conducted a pre-qualification process and notified prospective organizations that only pre-qualified applicants could respond to the RFP. The pre-qualification solicitation of interest is in Appendix B. After receiving seven pre-qualification statements and three responses to the RFP, the committee conducted interviews of each applicant. Then, the committee formally recommended that the association hire one of the applicants.

Each committee member presented the decision to their respective association boards and asked to move forward with retaining an attorney to review a draft contract and a memorandum of understanding (MOU) produced by another committee — this one with two representatives from each association. The MOU details the management firm's oversight structure, the cost-sharing arrangement among the three associations, financial procedures, and dispute resolution. All three association presidents signed the MOU, which is included in Appendix C. All three association Board of Directors voted unanimously to approve the new contract with Association Resource Center (ARC), the organization that won the bid.

The contracts were based on the scopes of work provided by each association. It was difficult to figure out how to split the costs given each association's differing needs, so it was decided that the association committee would meet at the end of the year to ensure that the split was fair.

Yet another committee was created to oversee the administrative support of the organization's activities. Now that election season is in full swing, this committee is having difficulty finding time to meet. Their ultimate goal is to create metrics for success.

The next big step for the shared services model is dealing with change management. So far it has been going smoothly. Members who have been volunteering to support their associations for a long time have been hesitant to change, but they are cooperating the best that they are able.

## Seven Takeaways from the Process of Arriving at the Shared Services Model

After participating in the process and debriefing with the association's leadership, CEAL identified seven takeaways from the process of identifying a collective need for administrative services across all three associations, and from arriving at and implementing the shared services model. These lessons are intended to inform other associations navigating change management and seeking to address operational, financial, and governance issues.

***Lesson 1: Talk to key association members and leaders and identify a "coalition of the willing" and a group of validators that is representative of many roles and perspectives within the association(s).***

Several members of CACEO are also members of CRAC, CAA, or both. The leadership overlap helped identify a "coalition of the willing" to spur change toward a shared services model. Having leaders and members overlap across associations also helped identify several validators (both internal and external to the associations) who helped gauge the steps needed to arrive at a solution. It's also helpful to identify external partners, like CEAL, who can support the visioning and strategy sessions.

***Lesson 2: Identify common challenges among association members and across associations. Any change proposed should address as many challenges as possible.***

In the case of CACEO, CRAC, and CAA, each association faced a unique yet similar challenge. One association lost its 501(c)(6) tax-exempt status due to a paperwork filing issue. Two of the associations were informed that their conference contractor planned not to renew, prompting both to begin seeking additional administrative support. One association had no experience with professional staff. These challenges are common across many election associations that the CEAL team supports.

The first part of the process was determining where each association was at and leveraging commonalities — each association needed administrative support, but had a fixed budget for it.

***Lesson 3: Brainstorm solutions that take advantage of collaborative opportunities.***

For the past two years, the three associations have been collaborating on the [UC Leadership Academy](#), a joint CACEO, CRAC, and CAA program with UC Davis that prepares the next

generation of public leaders. This project brought the three associations closer and introduced them to the UC Davis professor who served as a facilitator during the visioning session for the shared services model.

Local and national partnerships, like UC Davis and CEAL, are instrumental in helping association leaders think outside the box and seeing the needs of an association from an outside view. This can lend perspective to solutions and support association leaders in finding operational capacities that work for their members.

***Lesson 4: Document and share all efforts to support positive change management.***

The leaders of the three California associations kept meticulous notes and documents to ensure that the process of devising the shared services model was thoroughly recorded. Some of these documents are attached in the appendix of this case study.

The CEAL team is always looking to uplift creative solutions and document change management processes seeking to strengthen associations. If your association has an initiative that you'd like to see written about, please reach out to us.

***Lesson 5: Lean into the strengths of your association leaders.***

CACEO's president, Jesse Salinas, quickly identified CACEO secretary, Natalie Adona, as an essential champion in this effort. Adona's background in policy and her ability to synthesize ideas in writing made her contribution to this effort indispensable. CRAC's president, Dean Logan, was also identified as a key advocate because of his membership across associations and ability to convey ideas clearly. John Tuteur, the Assessor, Recorder, Clerk, and Registrar of Voters in Napa County, who is also a member of all three associations, was also a major driving force in helping everyone stay on track. Knowledge of the strengths of the current and future association leaders was key to this effort.

***Lesson 6: There will always be naysayers — hear them out and proceed with the option that has the most traction among association members.***

The association leaders who decided to pursue a shared services model for these three California associations spent a lot of time talking with association members and hearing their concerns about the model. After much deliberation, the association leaders agreed to pursue the shared service option because 1) all associations needed support in some way; 2) no alternative was proposed; 3) time was of the essence; and 4) it is a cost-effective method of supporting several associations.

***Lesson 7: Formalize collaboration through clear written agreements.***

The memorandum of understanding (MOU) was critical to clarifying governance roles, financial responsibilities, cost-sharing arrangements, and dispute resolution processes. Early investment in defining structure reduced ambiguity and strengthened trust among the associations.

## Conclusion

Change management requires both courage and an open and inclusive process. By investing in a shared administrative framework, CACEO, CRAC, and CAA positioned themselves for long-term sustainability while preserving their distinct mission and identities. The collaborative services model is one option for associations seeking bolstered administrative support, including operations, finances, and governance. In the coming years, CACEO, CRAC, and CAA will evaluate the impact of this decision against their 2026 goals.

Associations need bandwidth to tackle complex problems, especially as jobs become increasingly complex. This starts with a solid, working governance model that plays to the strengths of the association's leaders and future leaders. As associations nationwide face increasing operational complexity and leadership demands, shared services models may offer a scalable solution that enhances governance capacity, reduces risk, and supports strategic growth.

The CEAL team offers support to associations in the form of strategic governance, operations, and finance assessments, monthly networking opportunities, bylaws and policy reviews, strategic planning meetings, and an annual association-focused workshop. If you are interested in learning more, please reach out to [ceal@electioncenter.org](mailto:ceal@electioncenter.org).

## Appendix

### **Appendix A: RFP**

### **Appendix B: Pre-qualification Solicitation of Interest**

### **Appendix C: Memorandum of Understanding (MOU)**

All appendix materials are available online at the CEAL Community Resource Library at [electioncenter.org](https://electioncenter.org).