JOHS Provider Conference
June 6, 2025

Notes from Session: That's Not My Job! The Unfortunate Misconception That Finance and Program Can't Work Together

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Moderators: Terri Hsieh
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-Main Points from Session Overview/Presentation (high level; detail not required):
- Shift mindset and understand how our finance and programs can work together
- Overcoming the barriers across these teams is doable!
- Contract compliance can bridge gap between programs and finance
  - Help to illustrate why numbers are important along with speaking to the human aspect in the numbers
- Why this session?
  - Build understanding and trust
  - Align around shared goals, serve people more effectively and sustainably
  - Our mission depends on compassionate service delivery AND financial health and accountability
  - Clients lose out when our teams aren't aligned
  - Funders and public trust depend on both impact and stewardship
  - Shared accountability to the mission, the people we serve, and each other
- We each care very deeply and want to understand what your scope of work is so that we can more effectively and sustainably serve our community from each of our lens of expertise
- You can't over communicate! Communicate early, communicate often!
- Clear emergency spending protocols, share strategic plan early, regular check ins, program/finance budget co-creation, and spending tracker tools can all be helpful solutions
- Not each side's responsibility to receive training or experience, but shadowing and introductory conversations can also be helpful to understand how one job role affects another
- Understanding the language that programs and finance use also is a great strategy! Things like: Fiscal Year, Restricted Gift, Outputs, and Outcomes are helpful to learn what they are and why they're important

- We don't need to know how to do each other's job, but we do need to know what each other's job is, and often we don't.

-Questions/Answers (summarization):
- What are some of the technologies used to automate processes/improve efficiency for program staff?
  - Switching accounting software has been helpful, and can take time to adjust to. **Sage** accounting software has been a helpful switch
  - Salesforce helps keep everything all together
  - The mindset of not being able to invest in software can sometimes come up. Up to leadership to invest in tools that will streamline processes
- Has finance considered using software used across property management?
  - In the realm of possibility, but need to consider how an organization can make that software work for them
  - Getting 'read only' access for other softwares being used across the organization can also be helpful for integration feedback

-Main Discussion Points not captured above:
- Program managers creating a monthly budget/spending tracker has been helpful to see amounts spent by person/program/month, per year
- Quality/Data is also a helpful team to connect into this! Process management
- Defining where one team's process starts and ends has been helpful, and then getting feedback on the additional starts/stops of other involved teams
- All teams are all under the same mission, and organization leadership can and should steer towards this common goal
- In one word: communication. All about communication, and having the time and space for communication is key

-Takeaways or Follow-Ups for JOHS (expectations/priorities/recommendations/etc):