

Finance and Operations Highlight – October 2025

Finance	IT	Human Resources	Operations/Facilities
- Completed annual audit and 990 work. - Finalizing Policy and Procedure handbook for leaders. - Controller is almost through CNAP certification! - Progressing the Earned Income Sustainability work - three Board Liaisons identified, and income sources confirmed. - Interviewing OCIO candidates to support Accola's long term investment goals - Ongoing FP&A with new program directors, and regular financial review with current Directors	- First (design) phase of Accola intranet site, with many opportunities for information sharing across all programs. - Continued clean-up and migration of sites, files, technology (moving from individual accounts to Accola business accounts). - Regular Phishing testing and focus on cyber security, assessing ongoing technology needs and solutions for programs. - Training Systems Administrator to develop in-house IT capacity, to provide more support to program staff.	- HR support still with outsourced agency, with benefits management and payroll in-house. - Preparing for open-enrollment and new MN tax and leave requirements. - Updating Employee handbook with Accola branding and policies/procedures. HR company assisting. - Currently conducting compliance assessment and update of: wage-related laws, ESST requirements, documentation, etc.	- Starting regular meetings with program leadership to share updates and identify synergies across programs (facilities, ops, et.) - Reviewing existing leases against recent changes to assess opportunities to update. - Project: combine operational policies of Foundation, relative Province policies, and new Accola ones into Operations handbook (included in leaders finance handbook) - Re-negotiated insurance MOD score as free-standing organization, reducing rate.