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Newberg, Oregon
Class of 2010

Leadership Alliance Project Report

The project I selected and worked on over the last year was to research and implement the best software for Friendsview in the Business Office and to integrate it with other department's software needs. Quickbooks was selected and implemented. The financial data is reliable, easy to access, and monthly reports are distributed to all departments timely.

Benefits of this research are both tangible and intangible. Tangible in that the reports are available by email and the data is reliable. Benefits are intangible by the comfort of accurate and timely information to make decisions. The department directors have good information to use as tools in their daily work for the mission of Friendsview.

The people on the team for the software conversion to Quickbooks included business office staff, all department directors, residents, and board members.

There was constant communication through the process through department staff meetings, reports at the senior management weekly meetings, reports to the Board finance committee and the board.

Challenges included bringing the business office staff to understand the need for the change of systems; Training times with the different shifts of receptionists; Time management of data conversion and quality control; keeping up with the day to day work and conversion with a positive perspective.

To overcome these challenges we continued to remind ourselves and list the benefits of the conversion. We took time to coach and train each user of the new system – to invest in our users- one on one. In the first couple of months the reports were slow as back data was entered. By the end of the 1st quarter we were fully integrated. When financial data was requested we knew that with Quickbooks we would be able to provide accurate and timely information.

There are several Leadership Behaviors that were critical for me to learn to be successful in the completion of this project.

- A. **Build consensus around Friendsview's values.** This behavior was important to learn because the consensus model is what the Quaker belief values. When meeting with the

office staff at our monthly meetings it became important that we were all working off the same page – that we had the same values in mind when decisions were made. The software change was discussed early and frequently, talking about the current issues and how to resolve them, and with what outcome.

- B. **Challenge people to try new approaches.** Is the same way we've always done it the only way? It was critical to challenge current processes to move forward. We kept asking the questions "why do we do it this way" "what is the goal?" "do we still use this information in the same way?" By doing so we omitted several processes that had been extinct by another computerized system, but not stopped because of fear of change.
- C. **Make certain that goals, plans, and milestones are set.** Where are we going? What are the steps to get there? Writing down the goals became very important. What needed to happen in what order had to be determined to set the course. It was easy to get distracted by new ideas and stalled at a comfortable spot, so setting the milestones and having consensus drove the accomplishments.
- D. **Recognize People for commitment to shared values.** Appreciating the staff, co-workers and board members through reminders and gratitude of their participation and support through the transitions. The extra effort to acknowledge one another reaps positive benefits of good attitudes, willingness and team support. It was a huge challenge and the outcome of timely and reliable information is rewarding.