



HACM/YARDI

VOYAGER FINANCE PROJECT  
KICK-OFF

Presented By Bill Iliopoulos

and Fernando Aniban

October 2<sup>nd</sup>, 2023

# Agenda

- Introductions and Yardi Team
- HACM Project Team Responsibilities
- Communication Plan
- Project Implementation Initiatives
- Projected Timeline
- Project Next Steps

# Yardi Project Team

Name	Title
Bill Iliopoulos	<ul style="list-style-type: none"><li>• Project Manager and Coordinator – PSG Group</li></ul>
Chris Baker	<ul style="list-style-type: none"><li>• PHA Practice Team Lead</li></ul>
Consultants – PSG – TBD	<ul style="list-style-type: none"><li>• Will be engaged in design, setup, testing, train-the-trainer efforts</li></ul>

# HACM Project Team

Name	Title/Role
Fernando Aniban	• Deputy Director/Project Sponsor
Rick Koffarnus	• Director of Finance
Mike Wesolowski	• IT Director
David Schultz	• Finance Manager
Kent Britton	• Procurement and Contract Director
Alison Woznicki	• Construction Project Manager
Kazoua Xiong	• Financial System Analyst/Project Lead
Marcela Chavez	• Yardi Resource/System Administrator

# HACM Project Team Responsibilities

- *Responsible for gathering system requirements for setups.*
- *Attending all meetings or working sessions and providing updates as needed*
- *Making decisions on system setups.*
- *System setups and will work closely with Yardi in understanding system.*
- *Trained at various internals and become Voyager SME's.*
- *Document new HACM process.*
- *Lead and conduct system testing.*
- *Lead and conduct end user training.*

# Communication Plan

- Bill Iliopoulos – All project communication matters from Yardi side
  - Will coordinate Yardi resources and tasks with various team members
- Fernando Aniban – Project communication matters from HACM side - SPOC
- Kazoua Xiong – Project Co-SPOC. Should be cc'd on all project matters.

# Project Implementation Initiatives

- **Finance Components**

- Combined Chart of Accounts
- Additional Entities/Departments
- Full Accounts Payable
- Full Accounts Receivable
- Full General Ledger and Bank Reconciliation
- Capital Fund/Grant Management

- **Procurement**

- Purchase Order Tracking
- Purchase Order Approval
- Explore Contract Management

# Projected Timeline

Milestone Tasks	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	
BPR/Design/Process Overview	█																
System Setup					█												
Non-PHA Data Conversion Effort (ETL)					█												
Security Setup					█												
Testing Phase - UAT Training							█										
Testing Phase - End-to-End System Testing							█										
Testing Phase - UAT Guidance								█									
Train-the-Trainer ( <i>Yardi Instructor Lead</i> )									█								
End User Training ( <i>HACM Lead</i> )										█							
Prepare Live Environment (Leverage ETL)											█						
Go-Live Deployment														█			
Go-Live Support																█	

## Conversion Milestone Weeks

- System Setup for Testing, April 2024
- Testing Phase Complete, July 2024
- Training Phase Complete, September 2024
- Go-Live – November 2024
- Cut-over from Multiview to Yardi – Jan. 1, 2025



# Project Status & Next Steps

- Begin BPR/Design Sessions
- Finalize New Chart of Accounts
- Finalize New Finance Structure

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# THANK YOU

WE LOOK FORWARD TO WORKING WITH HACM

QUESTIONS??