

# Housing Insights Prototype Design Session #2

December 15, 2016

## **The Problem:**

Because most affordable housing is privately owned, developers can choose to stop participating in subsidy programs and sell their buildings. The DC government and housing advocates are interested in 'preserving' these buildings - keeping them affordable, and spend time and money to do so.

The current process is largely reactionary – working with buildings only after they've found out an owner has decided to sell. In addition, there are many competing considerations for deciding which buildings are most important to preserve – you may want to maintain income diversity in a gentrifying neighborhood, or preserve more overall units in a less expensive neighborhood. While most people agree on the list of priorities, they don't necessarily agree on their rank.

## **Draft Project Mission:**

We want the District to use data and a consistent approach to ranking priorities in allocating funding for affordable housing preservation.

## **Daily Use:**

For each building, neighborhood, or ward there may be a different 'most important issue.' We want the tool to allow the users to find the information relevant to that issue.

## Today's Agenda:

### **1) Setting the stage (20 min)**

- Review our key design principles from last week
- User perspectives – Evaluator and Policy Advocate perspectives, brief Q+A
- Data Review – our draft list of potential data types and fields

### **2) Looking for Inspiration (30 min)**

While doing this, we encourage you to take notes and draw ideas for our tool.

- Lightning Demos - review each of the links of existing tools to draw inspiration.  
<http://housinginsights.org/resources/inspiration>
- Walk around / discuss screenshots and sketches.

### **3) Design Sketches (40 minutes)**

- Sketching: Using your group's user perspective, sketch a mockup of the main page of the tool. On the back, write a one sentence explanation of what element of your design you think is most important.
- Quick review: Present your design in groups of ~2-3

# Summary of design criteria

Based on our user profiles so far, and our discussions last week

"I prefer a tool...." - what are the ~3 most important design principles for this user?

## *Policymaker*

1. Build a narrative / story
2. Timely information - up to date more important than 100% verified data
3. Verifiable historical data - while timely info is important, 'citable data' and analysis derived from only citable data (i.e. excluding incomplete timely data) should be clearly distinguished
4. Summary-forward, but allow for deeper analysis

## *Tenant Advocate*

1. Alerts me to new info instead of requiring constant review
2. Helps me be pro-active
3. Allows me to quickly asses properties on the criteria I deem important

## *Policy Advocate*

1. Efficient with time / quick hitting
2. Lead with the story - the ability to explore the data on your own is important, but when balancing this tradeoff, the story/narrative should come first
3. Make the data/findings transportable - export and embed graphs in websites and reports

## Other notable criteria:

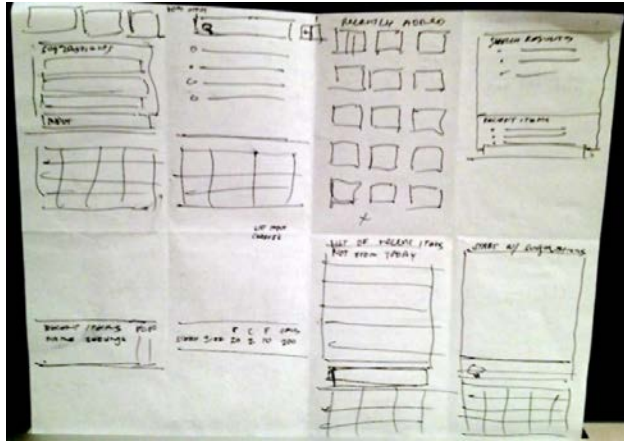
- Showing change is more important than current status (i.e growth of market rent level more useful than straight market rent level)
- Focus on identifying outliers / interesting points, (both for neighborhood characteristics and buildings)

# Activities

## Crazy 8's

Take one design idea you think could work well for our tool – either your own, or based on one of the inspirations you had before. Ask yourself “What would be another good way to do this?” – this can be just tweaking the idea, or doing the same thing in a totally different way. This should focus on just one problem, though.

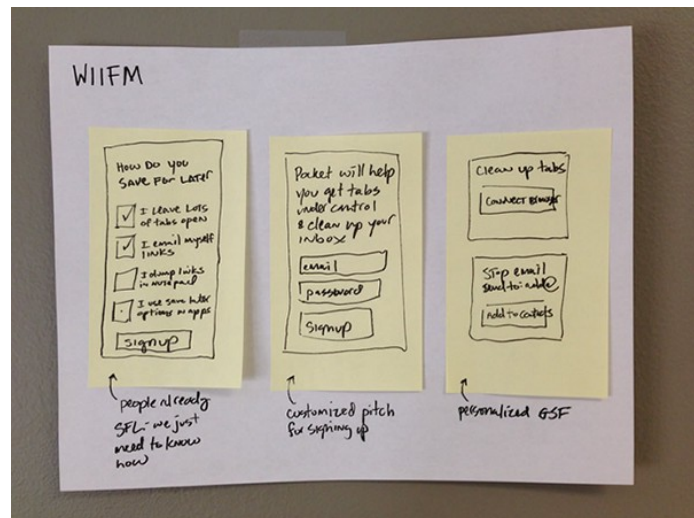
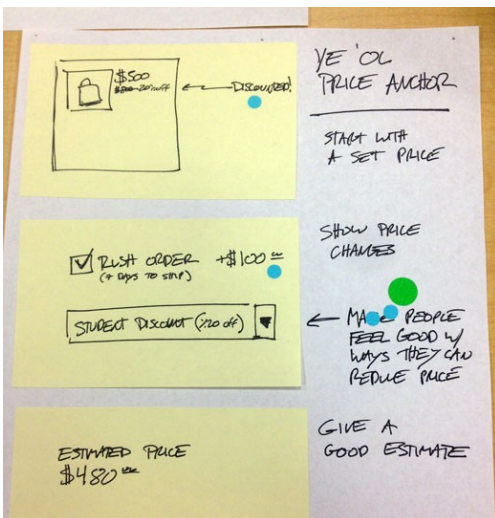
Fold a single piece of paper to make 8 boxes. Take 1 minute per box to sketch a variation of your best idea. This sketch is just for you, so don't worry about being messy.



## Solution Sketch

Draw a standalone sketch of your best idea. Typically, you'll want to use a 3-panel format by putting 3 Post-it notes on one page, but you can also do a full-page sketch if needed.

- 1) Make it self-explanatory
- 2) Words matter (don't use Lorem Ipsum for titles, labels, buttons etc.)
- 3) Don't worry about your drawing skills, but be as neat as you can.
- 4) Focus on core design details – we can fill in 'must haves' like navigation bars later.
- 5) Give it a title, so we have an easy way to refer to it (no need to overthink it)



Data Source	Potentially interesting data points
Preservation Catalog	<ul style="list-style-type: none"> <li>* Address, ward, neighborhood, etc.</li> <li>* Total assisted units, by bedroom size</li> <li>* Total units including market rate</li> <li>* Active/Terminated</li> <li>* Subsidy type (can be multiple types)</li> <li>* Subsidy expiration (one per each subsidy type)</li> <li>* (Section 8 only) % likelihood of terminating their contract</li> <li>* Most recent contract renewal duration (months)</li> </ul>
Distance to transit	<ul style="list-style-type: none"> <li>* Distance to closest metro</li> <li>* Number of transit routes (bus + metro) within 0.5 miles</li> </ul>
Inspection scores (REAC and DCRA inspections)	<ul style="list-style-type: none"> <li>* Most recent score</li> <li>* Pass/fail history</li> </ul>
Market rents and home prices	<ul style="list-style-type: none"> <li>* Median/upper/lower quartile rent in census tract</li> <li>* Median rent in neighborhood/ward</li> <li>* Trend in rent or real estate sale price over past 5 years</li> </ul>
Neighborhood demographics (population, education, employment, other census data)	<ul style="list-style-type: none"> <li>* Neighborhood income distribution</li> <li>* Unemployment rate</li> <li>* Race percentages in neighborhood</li> <li>* Vacancy rate in neighborhood</li> </ul>
Owner details (non-profit or for-profit owner, registered name from property records)	<ul style="list-style-type: none"> <li>* For profit or non-profit property owner</li> <li>* Name of property owner</li> <li>* Partners of the property owner LLC if available (tough data task)</li> </ul>
Quantity of nearby affordable units	<ul style="list-style-type: none"> <li>* Number of units</li> <li>* Number of units by each bedroom type (1,2,3,4, 5+)</li> <li>* Number of units by each %AMI level</li> </ul>
Resident characteristics in the property (%AMI, vulnerable population)	<ul style="list-style-type: none"> <li>* % AMI requirements of affordable units</li> <li>* Other resident info (handicap, elderly, language, etc.) only available for a limited subset of buildings</li> </ul>
TOPA notices (tenant opportunity to purchase act)	<ul style="list-style-type: none"> <li>* Each TOPA notice received over past time period, with the address of the building it is associated with.</li> <li>* Number of units in the building</li> <li>* If in PresCat, all building info</li> </ul>
Upcoming private neighborhood investment (building permits, Planned Unit Development updates)	<ul style="list-style-type: none"> <li>* Address and name of building permits w/in X radius</li> <li>* PUD updates w/ address and name of each update.</li> </ul>
Value of the property (tax assessment, etc)	<ul style="list-style-type: none"> <li>* Current total, land, and improvement tax values</li> <li>* Previous total, land and improvement tax values</li> </ul>

Current data detailed data dictionary linked here: <https://github.com/codefordc/housing-insights/issues/38>

# Scenarios

(optionally use one of these to help you think of ways to focus your design)

## Policy Advocate

- 1) You have a list of the 50 buildings that were awarded funding in previous cycles of the Housing Production Trust Fund. You want to compare these buildings to the 'Prioritization Scoring' criteria to look for anomalies between the stated priorities and the buildings that were awarded funding. You don't have the list of buildings that were rejected.
- 2) You are working on a report showing the overall change in affordable housing over the past 5 years, showing the loss of buildings and their impact on both the neighborhoods and the total availability of housing for low income residents.

## Policymaker

- 1) You are a staffer for Councilmember Charles Allen of Ward 6. He asks you to collect information on the affordable housing in your ward so he can evaluate the impact of an affordable housing bill that is coming up in city council.

## Tenant Advocate

- 1) You are working with residents of a 50-unit multifamily building in Columbia Heights, who have just received a TOPA notice. You want to demonstrate the impact that losing this building would have on its neighborhood. You don't know which criteria will be most important for this building, but look at the 'prioritization scoring' section of the RFP page as well as our data sources list for potential components.
- 2) For 2018, you want to set aside 20% of your staff time to proactive assistance for buildings – instead of waiting to receive TOPA notices, you want to identify the buildings most at risk so that you can contact the owners and tenants. You know that TOPA notices often follow a contract expiration, and you can look at the risk score associated with the building from the risk algorithm being created as part of this project. Your non-profit focuses just on buildings with at least 50 units, and although risk is a big factor you also have to find buildings that have needs that match with the skill set of your team.

## User Types

### Policy Advocate \*

Puts pressure on Policy Maker directly and through other advocates, and through the press. Their goal is for policymakers to adopt and implement policies that provide opportunity for low income residents.

### Tenant Advocate \*

Tenant advocates help the tenants of specific buildings whose owners have decided to sell their property to navigate the legal process and protect their rights, especially through DC laws like the Tenant Opportunity to Purchase Act (TOPA).

### Policy Maker \*

Wants to understand the impacts of funding allocation strategies city-wide or within their ward. Likely user is the staff person compiling reports like the Preservation Strike Force report or the manager in charge of determining how funding applications are processed. Can impact funding distribution directly (e.g. Policy-level people at DHCD, Deputy Mayor for Planning and Economic Development) or indirectly (council member staffer or councilperson, mayor's office).

### Evaluator\*\*

Reviews applications, allocates funding to specific buildings and tracks their compliance with necessary requirements. Example: distributing Housing Production Trust Fund money at DHCD, Housing Finance Agency staff overseeing individual loans.

### Developer

Owners of buildings may be for-profit or non-profit developers. Many developers are allies of the tenant advocate and policy advocates, especially mission-driven developers who own affordable housing properties with the goal of helping residents, while other developers may not be. Developers may use the tool in writing applications for city funding, for example, and the tool may be accessed by both positive and negative

### Press

Interested in catching the public's attention. Often gets their information from the other users (especially the two advocate roles), but for more detailed stories will want access to primary data.

\* Likely early adopters of the tool

\*\* Most desired end user of the tool, although not typically an early adopter

## User Type: Policy Advocate

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### Example Job titles:

- Vice President of Housing Policy at the Coalition for Nonprofit Housing and Economic Development
  - Housing Policy Analyst at the DC Fiscal Policy Institute
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### What problems are they trying to solve?

Policy Advocates want to ensure that residents with low and moderate incomes have housing and economic opportunities in neighborhoods throughout the District of Columbia. This means making sure that stated policies and regulations are designed to provide these opportunities, but also making sure the reality of their implementation meets these goals as well.

They think that a tool to help them analyse the decisionmaking process would shed some light on an otherwise opaque funding allocation process. It would also allow them to search for indicators that policy reality contradicts stated objectives of the policy maker.

### Who do they interact with?

Policy advocates communicate regularly with tenant advocates, policy makers, and developers.

### What does their workflow look like?

Many of them have existing systems for tracking data, and are aware of and use existing public data sources, usually in the context of writing reports for publication. But, the amount of time it takes to compile this information limits how often they can use it and how quickly they can make it available; while some policy advocates are able to analyze available data themselves, others aren't experienced in data analysis and have to rely on others for providing information to support their arguments.

### What are their incentives? What motivates them?

Policy Advocates are incentivized and motivated by keeping the city demographically diverse; making sure low income residents still have opportunity in gentrifying neighborhoods; pushing government to improve the quality of its services; and eliminating real or perceived corruption that could exist between elected officials and developers.

## User Type: Tenant Advocate

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### Example Job Titles:

- Tenant Organizer at the Latino Economic Development Center
  - Staff Attorney at Bread for the City
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### What problems are they trying to solve?

Tenant advocates help specific residents whose buildings are at risk of being sold and who might be displaced as a result. They are trying to find information that can be used to advocate for the preservation of a building. This information could help them have data to back up narratives, and could be used in courts or fair housing funding applications.

### Who do they interact with?

Tenant advocates work on behalf of tenants of at-risk buildings. They're often on the front-lines of hearing what areas or buildings are at-risk for being sold. They understand the history and demographics of neighborhoods and specific buildings.

### What does their workflow look like?

Tenant advocates typically get involved when they find out a building owner is planning to sell their building, either through a TOPA notice or when they are approached by a tenant. They don't have enough time to help all the buildings they talk to, but each organization may have different criteria for choosing. This is often where they can have the most impact - where a specific legal consideration is relevant, where residents may have a much harder time finding new housing, or with larger buildings which may take more time but their time per resident may be smaller.

### What are their incentives? What motivates them?

Tenant advocates are incentivized by helping residents of specific buildings successfully keep their affordable housing. Like the policy advocates, they are also motivated by keeping the city demographically diverse. However, while they care about city-wide policy, they mostly work within the context of the existing system working to keep specific tenants in their homes.

Reactionary nature of their work is a pain point, as is the difficulty of getting tenants to organize and, fighting for the future affordability of the units.



## User Type: Policymaker

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### Example Job Titles:

- Staffer to a DC City Council Member
- Office of the Deputy Mayor of Planning and Economic Development
- Managers at DHCD deciding on the RFP evaluation process

This role covers all levels of policy development - legislative and regulatory

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### What problems are they trying to solve?

The policy maker wants to know where the city should target its efforts and funds to have the biggest impact. They determine what kinds of funding allocation and initiatives can best make progress for the city, so they want to know which locations in the city deserve higher incentives or scoring points for developers to build / preserve there, and why. Their biggest question is balancing competing needs - what policy changes could help preserve affordable housing without depressing revitalization in the city?

### Who do they interact with?

Policymakers at the legislative level may need to deal with lots of issues, so they rely on policy advocates, developers, and other interested business representatives and citizen groups to guide them on the issues. They know each of these groups provides information that supports their own point of view, but they also need these subject matter experts.

Other policymakers are focused specifically on affordable housing preservation. The Mayor's stated goal is preserving 100% of existing affordable housing, and they're responsible for the decisions about how to do that.

### What does their workflow look like?

They may write reports or briefs, or attend meetings with other levels of policymakers, to advise on decisions about official DC policy, initiatives to start or continue, or legislative bills that may be coming. They must be careful to consider many competing views and considerations before making official statements.

### What are their incentives? What motivates them?

The Deputy Mayor of Planning and Economic Development lists its first goal as [increasing affordable housing](#), and the DC government allocates more than \$200M/year on affordable housing, including the \$100M Housing Production Trust Fund. However, preserving affordable housing can often be directly in conflict with other goals like economic revitalization and rebuilding retail corridors; this budget is also insufficient to serve the goal of 100% preservation.

Many policymakers are accountable to mayoral directives and goals, and all are accountable ultimately to the public. They need to show that funds are being used effectively. The DC government overall is interested in transparency and open government, but many specific issues are slow to become open due to resistance to change as well as the fact that even good decisions will be criticized by someone.