

DAHLIA TRAINING FOR SERVICE PROVIDERS WEBINAR TRANSCRIPT

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Presenters:

Marie Kegel, Program Director, Homeownership SF

Barry Roeder, Strategic Projects, Mayor's Office of Housing and Community Development

Maria Benjamin, Director of Homeownership and Below Market Rate Programs, Mayor's Office of Housing and Community Development

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Marie, HSF:

I'm Marie, Program Director with Homeownership SF. We are a citywide coalition of nonprofit housing counseling agencies. We provide services to residents here on rental education, the home buying process. We provide the required educational components for folks who are trying to access BMR ownership properties and the city down payment assistant programs. We also have services geared for current homeowners to help them be successful with homeownership. If they're having issues, we make sure that they know what their options are and connect them to resources around those.

With DAHLIA we are partnering with the Mayor's Office of Housing and Community Development to provide some technical assistance on their behalf. We are working with the service providers, you all, who are working with folks trying to access these affordable housing opportunities. We are leading trainings on these opportunities geared for service providers. This is one of four that we'll lead. We had one back in January. We will have two more trainings sometime in the summer. The dates still need to be set but we want to make sure that these trainings coincide with new releases and launches and additional functionality that continues to be added to the DAHLIA portal. So stay tuned for that information and those dates. We'll make sure that there are a lot of announcements that go out about that. If anyone does need assistance before that, I'm recording this webinar so we can make it available to colleagues or other folks from other service providers.

Here at Homeownership SF, we're not just providing these trainings. We're here for ongoing technical assistance and support. So if you do have questions, concerns, issues that you're running up against with DAHLIA, please reach out to us. We want to help walk you through that process and we want to make sure that we are relaying this information and your feedback to the Mayor's Office of Housing so that they can use that as they continue to make changes and as DAHLIA continues to evolve.

So that's Homeownership SF. And again, we want to hear from you. We want to hear how this site is going so please stay in contact with us. I do want to quickly introduce some of our partners in this from the Mayor's Office of Housing. Maria, are you able to speak? Can you maybe introduce yourself and tell everyone about your role in this?

Maria, MOHCD:

I am so happy to have so many people on the call. We're really excited about DAHLIA, the roll out, and all of the work that's gone into making sure that we have a system that is user-friendly. So I'm really pleased with how far we've come. And we have ways to go. Barry and Marie will fill you in on all of that. I just want to take this opportunity to thank everybody who has had input into the system, whether it's been user testing or whether you found people for us to test. That's been invaluable and we would not have been able to

build such an intuitive system without the input of people who will actually use it. So I don't need to say anything else. I'm going to put my phone on mute now and let Marie and Barry take it away.

Marie, HSF: Thanks Maria. And Barry, can you introduce yourself please?

Barry, MOHCD: Sure. My name is Barry Roeder and I work with Maria here at the Mayor's Office of Housing and Community Development. I oversee strategic initiatives for the department and that includes DAHLIA. I want to add quickly, as Maria said, that feedback and your involvement are critical to the success of this project. Our methodology has sort of been atypical for a government software, if you will. And that is that we meet on a regular basis with real users; both the housing counselors and also the developers and also the folks that would really be applying. Whatever successes we've had to date are a result of that. I also convene monthly, or sometimes every other month, a Task Force where we talk to the community and especially service providers about DAHLIA. If that's something you're interested in, please let Marie or me know and we'd love to have you there.

Marie, HSF: Great! Thank you, Barry. Alright, we'll launch right into this.

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Marie, HSF: We just want to give a bit of a context for what has the landscape been like that DAHLIA is coming into and what are some of the problems that DAHLIA is trying to address.

We're fortunate enough to live in a city that is really engaged in trying to make sure that there are affordable housing opportunities for everyone in the city regardless of income levels and what's going on with you and there are a lot of different strategies and programs that are out there but that's also created a bit of a problem because it's fragmented the housing resources that are available. Different programs have different stakeholders. They have different processes and applications. And all of these are being held in different places and being touched by different people. Folks who are trying to access these affordable housing opportunities almost have to become professional home seekers. They have to look at a bunch of different sites and access different resources and fill out different types of applications and do that process over and over and over again to hopefully get an opportunity that comes their way.

DAHLIA is really trying to address that same problem that we've had. And it's trying to do it in a way where all stakeholders involved are getting something positive out of it. It's easier for our clients and the home seekers who apply and sign up for these opportunities. It's a more streamlined process for the City to manage. There are functionalities built in to help the leasing agents and the developers as well. And it takes us as nonprofit service providers into account as well.

Another issue is that we have folks filling out these really long applications, 15-20 pages, and they're doing that over and over again for very low chances of actually being selected and being approved and getting into an affordable housing unit. DAHLIA is trying to address that issue as well.

Up until this point there hasn't been a whole lot of transparency around the process. There have been issues and breakdown in communication around making sure that client stays

informed about where they're at in the process, what the next steps are, keeping them informed about what is going to happen next. For example, I submit my application and then they don't know. Wait and see and wait and hear and maybe you may never hear again. So again, DAHLIA is trying to address that problem.

Again, we're taking into account the leasing agents and the developers and what their needs are and trying to make it more streamlined for them to review the applications and make determinations about applications for the affordable housing unit.

Because all of this information has been stored in different places, we haven't had opportunities to aggregate this data and really get a detailed picture about what's happening and our communities' need in San Francisco and what can we do to better serve our residents and make sure we're addressing our communities. DAHLIA is part of the solution to fix these problems.

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Marie, HSF:

DAHLIA's main goal is to serve as a one-stop resource. We're trying to make it easier for folks to find and apply for the housing opportunities that do come up. So this is going to be the one place that they need to go to. And it doesn't have everything yet, but eventually it's going to have all the listings and the resources and the affordable housing opportunities that are available in the city.

We're starting with the rental side of the picture. The first phases have been focused on the BMR rental program. We're starting to get into the 100% affordable multifamily developments by nonprofit housing providers. Eventually, we will look at including the homeownership aspect of that too, the below market ownership opportunities. It's going to contain all that information, which is really awesome!

Eventually, the Mayor's Office of Housing and Community Development is thinking about those other affordable housing programs, and voucher programs and things like that. Is there a way to incorporate those into DAHLIA? Maybe not have applications available for those but give information, links to those resources. Have information about wait list. Things like that. So they're in communication with HUD and other groups like that. So that may be coming further down the road.

DAHLIA is making the application process so much easier for our clients. It's going to be a quick, easy, short form application that's really one of the most revolutionary part of this new housing portal. Eventually this is going to be one application that folks fill out one time and can update as needed for future applications.

The application will get put into the lottery system. And if they are selected through that lottery, if they're one of the lucky few, then we'll be asking for more information and that's when they have to fill out a longer application. But at least at that point, chances are much higher that you're actually going to be placed into an affordable unit. They're only putting in that effort when the likely reward is much higher.

Through DAHLIA we're really trying to make the process a lot more standardized and add a lot of transparency to the process around applying for these affordable housing programs. Eventually all listings are going to be included in DAHLIA. All developers and leasing agents

are going to be using the same processes. It's not "Developer A has their own application and own process around the application submission and things like that and Developer B does something different and the application looks a little bit different." It's all going to be standardized, which is great and it's going to make things a lot easier for our clients.

And DAHLIA does a really great job of making sure that the clients stay informed about where they're at in the process, what the next steps are, what they can expect from the process, know what happened with their application. So a lot more communication and transparency around that.

In addition to all of the listings that are going to be located on DAHLIA, DAHLIA also links folks and makes it easier for them to access related resources that can help them with their housing goals – language services, housing counseling agencies, additional education and information – all of that. All of that is going to be contained in DAHLIA and it's going to be the one place we're going to be referring our clients to, which is exciting.

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Marie, HSF:

Let's talk a little bit about the short-form application. We're going to dive into it later on in the presentation. And Barry's actually going to even walk us through an application on the testing site for DAHLIA so we'll look forward to that.

But the short-form application is really the secret sauce of DAHLIA. It's really cool because to get to the point where we could have the short-form application, the Mayor's Office of Housing had to bring together all the stakeholders – the community and users, service providers, the developers and the leasing agents – and work with all these different groups to make sure that we had an application that fits everyone's needs, and that was also easy and simple for the users to fill out.

So it got pared down to a really short application. It's 4 pages if printed and half of a page is for optional demographic information and half of a page is for signatures so it's really 3 pages of information, which is awesome. Again, in the past, applications have been 15, 20 pages long so this is really nice. It's going to take folks a lot less time to apply for these opportunities where we expect 20 minutes or less to complete an application.

DAHLIA has a place where you can apply directly through the listing of that opportunity. But I just want to let you guys know that paper applications are not going away. They're always going to be available so if someone isn't comfortable completing it online, then that is still there. But there are a lot of benefits to using the site and completing an online application. Again, this application is going to be used for all listings so you're not filling out different information for different opportunities that you're applying for. And eventually, we're going to have built into DAHLIA the functionality to take information from past applications and autofill it into new applications. If someone creates an account through DAHLIA, it'll store their old applications and eventually if that person wants to apply for a new affordable housing opportunity, it will just dump that information that they completed last time, ask them to verify some of it, maybe update some of it. But it will make the process easier moving forward. In the future, hopefully one application, one time.

We're just trying to make this really easy for the user and make sure that the effort they're putting into filling out these applications is more in line with their likely outcomes. So if

there are low chances of getting an affordable housing unit, because we know about the lottery system and a lot of people end up applying for these, then we still want to make the application process as quick and painless as possible for these folks.

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Marie, HSF:

So talking a little bit about the electronic lottery, the spinning raffle drum – that’s going away. Lottery numbers are going to be issued immediately after someone submits the application online. If folks are completing paper applications, they will need to include a self-addressed stamped envelope to get their lottery number. And that’s how they’ll receive their lottery number. If you apply online through DAHLIA, then once you submit that application, it’s going to give that lottery number right away. It’s also going to email you that lottery number. Again, a big benefit to doing the online application.

The Mayor’s Office of Housing and Community Development is still going to hold public lotteries, but if you apply, you don’t need to attend those lotteries. Something that’s really nice is that DAHLIA has the technology where it’s doing these lotteries electronically. The logic has been built into the system where it’s incorporating all the different lottery preferences that apply to that particular listing. The ones we listed here are really common ones – Certificate of Preference, Displaced Tenants, Neighborhood Residents, Live/Work in San Francisco. If it’s an OCII project, it might have the Rent Burdened or Assisted Living Preference. Those preferences are being incorporated into the electronic lottery, and when the lottery happens, it’s going to be able to give everyone detailed information about that outcome with that lottery. So not just “I’m ranked 750 out of 1100,” but within the different preference buckets that may apply to me, what my ranking is. And the cool part is that online on the website, you can type in your lottery number to get that information basically instantaneously after the lottery happens.

Again, folks don’t need to go to the public lottery. This is something that can be done online and they can still access that information about what their results are, personalized to them for this lottery through DAHLIA. One thing about the preferences, and we’ll probably talk about this throughout this presentation, we want and we’d love your feedback around how to explain or what language to use to best explain these preferences to our clients and folks that are applying for these units. We want to make sure that we’re getting it right so people understand what the preferences are and which ones pertain to them so that we can have confidence that folks are claiming the preferences that are relevant to them. If there are preferences that are relevant that can make a big difference in helping folks access these affordable housing opportunities. As you’re looking at these preferences with your clients, if you have feedback around that, please definitely send that our way to Homeownership SF so that we can relay this information to the Mayor’s Office of Housing and continue to do a better and better job of making sure that this information is really clear and easy to digest for the folks that are trying to access affordable housing.

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Marie, HSF:

DAHLIA really comes from a place where the design is focused on the user. Ever since its inception, there have been regular meetings – and Barry alluded to this – with the folks that are actually going to be using this site – our target audiences.

The Mayor’s Office of Housing and Barry’s team have been continually sitting down with folks and asking them, “What problems are you encountering trying to access affordable

housing? And what would you think if we try doing it this way or this other way? Do you understand the language that we're using? How do you feel about this?" Really making sure that we are getting input from communities that are using DAHLIA in their housing search and designing it for them. The goal is really to break this down and make this complicated process as simple and easy and basic and accessible as possible. Within this user-centric design, focusing on the folks that are really using this, folks who are actually applying to BMR rentals, folks with different needs. So meeting with different groups of people and making sure we're hearing from seniors and folks whose first language isn't English. Talking to these different groups and using their input to make this the best that it can be and to continue to make changes and iterate on the design of DAHLIA to keep improving it constantly. As Maria said, we're really excited with where DAHLIA is already, even today, and through the user-centric design, the Mayor's Office of Housing is making a product that is working. And we've seen proof of that because even during the pilot phase, there were tens of thousands of visits to the site and people applying through the site. They are good indicators that the site is on the right track, and we're making it very user friendly. Again, just a call, if you guys have feedback, comments, and suggestions, we want to hear that. You guys are the boots on the ground working with our resident and clients on these affordable housing programs, so let us know what you're seeing and hearing, and how we can continue to make this site better.

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Marie, HSF:

Just an overview of what has happened so far with DAHLIA, all the progress that's been made, and a preview of what's coming next.

The way that DAHLIA is being developed is through an agile development model. That means there are going to be incremental roll-outs of new functionality. The reason we're doing that is because it's a huge project but also because the Mayor's Office of Housing is so focused on making sure that we're talking to actual users and getting their input and making those changes. And that takes a lot of time. We're trying to do it right the first time.

What we've done so far. We've got general functionality and resources about the different affordable housing programs that are available to folks here. There are income and eligibility calculators. The Below Market Rate Rental Program, all their listings are located on DAHLIA now. As we discussed the electronic lottery is happening through DAHLIA. The short-form application is live, and we're using that for Below Market Rate rental opportunities. Just recently, the multifamily listings, those are going to start showing up on DAHLIA as well. I don't think we have any currently that have appeared, but Barry, correct me if I'm wrong but later this month we should have our first multifamily listing?

Barry, MOHCD:

It's going to be late this month or early next. We're still working out the particulars for that but that should be coming very soon.

Marie, HSF:

Coming up next, there's been work done on the multifamily online application and eventually we want to make sure that there are short-form applications in all four of the official San Francisco languages. In addition to English, it will have the applications in Tagalog or Filipino, Chinese, and Spanish. This will be for BMR and multifamily rentals.

It's really hard to give firm dates so our timeline for when this will happen, because of all the factors at play and making sure that a lot of testing and meeting with users goes in before anything rolls out live, but we're hoping, and again Barry please correct me if I'm wrong, that within the next four to six months there should be more of this functionality appearing on DAHLIA.

Barry, MOHCD: Absolutely. That's right. Our first phase of development runs through the creation of the multifamily online application. We're excited about that so we're looking forward to closing that loop and that will probably be sometime this summer, and then we'll move on to other things. After things within DAHLIA, we'll be adding more features, but the biggest chunks will be complete this summer.

Marie, HSF: We're going to make sure that we have additional trainings that take place that coincides with the launches of these additional functionalities so that we can talk specifically about those and folks are comfortable using them with their clients

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Marie, HSF: So we'll move on right along to just a quick note about metrics and analysis. One of the really cool things about DAHLIA is that it gives us a lot of information. Behind the website that we're going to be talking about is a Salesforce platform that stores all this data and allows us to look at individual users and where they're clicking and where they're going. We don't see specific information like names or things like that but demographics information. It's giving the Mayor's Office of Housing and Community Development a lot of really robust data to analyze and play with. That's being used and that only improves DAHLIA and make it better and more functional but to also inform policy decision about what are the housing needs and how do we best serve the folks that need to access affordable housing.

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Marie, HSF: Well then we can go ahead and take a look at the actual site. I hope all of you have looked at it so far. If you have not, I strongly encourage you to do that.

This is what the home screen looks like. You see the logo up here. It's always going to appear at the top. If you click that, it will always bring you back to this homepage. This site is in beta version. This is still a very new site and it's an ongoing project. It will be for a long time. It's something that's going to continue to evolve for the better and improve. There's a way to provide some feedback. Please feel free to reach out to Homeownership SF about that as well.

We'll dive into all of these different features. Language options are here at the top. We've got this banner that has options to browse properties. That's basically the same thing as clicking the "See Listings" button.

"My Favorites" is where you can go to see listings that you have favorited by clicking on the heart icon.

"Getting Assistance" will connect clients with additional affordable housing opportunities not yet listed on DAHLIA and different resources: housing counseling agencies, language resources.

“Sign In” is to create or access your account.

“Additional Opportunities” provides links to those affordable housing programs that currently don’t appear on DAHLIA that are still located on other sites.

There are “Income and Eligibility Calculators,” and we’ll talk about those.

And then a place to sign up to get the email notifications. We’ll talk about each of these features just now.

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Marie, HSF:

This is just an overview of that home page that I just went through.

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Marie, HSF:

Talking about language services. Eventually we want to make sure that we are providing language services in the four San Francisco official languages. Right now, that capacity is not there quite yet. So if you click on, for example, the Spanish option, it’s going to take you to a general landing page for that language and that landing page is going to basically say, “We don’t have everything here yet. Here’s what you can expect in the future. If you need help in the meantime, here’s a housing counseling agency that provides services in your language. So it has that information about different nonprofits that provide assistance to these folks who have a hard time navigating the site in English.

Like we discussed, the multilingual application, that’s going to be coming real soon. Hopefully in the summer.

Barry, MOHCD:

Marie, I should just jump in, it’s Barry again. We are in the process of revising those landing pages, as well call them, in the other three languages. Those were actually created a year ago when we launched this site. So obviously there have been updates since then. And we’ve gotten some good feedback that there’s some additional information we can provide there for constituents whose native languages is one of the other three. So we’ll be not only updating, but doing some expansion on that so you can look forward to that probably in the next month or so.

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Marie, HSF:

This is basically a page to connect the client with different resources that can help them with navigating this process and finding out more and getting additional support around their housing search. It lists different housing counseling agencies that are available in the city. It also includes their language capacity. So someone can find a housing counselor by clicking this button.

The language support, that’s going to lead to the same landing pages that we talked about when we talked about the language services.

For “Additional Opportunities”, if someone is interested in the BMR ownership program that’s not currently on DAHLIA, they can click on this “Additional Opportunities,” and it’ll provide them with a way to link to the Mayor’s Office of Housing website where that program is housed and those listings are available.

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Marie, HSF:

This is really a neat feature. We strongly encourage anyone who wants to be accessing and get information about the City's affordable housing program to sign up for the Mayor's Office of Housing's email notifications. They can do that easily on DAHLIA by clicking where this envelope is to sign up today. It's really easy to sign up. All they're asking for is first and last name and email address. And it even gives the option to sign up for rental listings, rental and ownership listings, or just ownership listings. Really making sure that they're getting the notifications for the types of housing opportunities they're most interested in.

The option to sign up for these email notifications also is still located on MOHCD's website. Folks can continue to sign up through there but it is located here on DAHLIA as well. It's just a really easy way to stay up to date on what's available and what's out there and to get in the action of this affordable housing search. The listings are going to be located on DAHLIA, but we really encourage that folks use this email alert sign up.

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Marie, HSF:

Here, we've got "Additional Opportunities." If you click on this button here to "View Additional Housing Opportunities," that will take you to a page that currently looks like this. This page will be changing as DAHLIA goes through its iterations and adds new functionality to it. Currently, the affordable housing programs and opportunities that are not listed on DAHLIA, you can find them here.

We've got different rental resources and services. You can click on these buttons, and it will take you to that link. For example, Compass One Home, it will jump to that One Home link so folks can see the different opportunities that are listed there. As more of these multifamily and nonprofit housing development opportunities get listed on DAHLIA, then this part might change a little bit. Eventually when the homeownership opportunities are listed on DAHLIA, then this screen is going to look different. This is what we're seeing here for now. The ownership part will stay there for quite a while until that functionality is up.

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Marie, HSF:

Here we have the "Income and Eligibility Calculators." This is pretty cool. When folks are interested in browsing listings, if they only want to see listings that only pertain to them and their situation, DAHLIA has this awesome feature, this "Eligibility Calculator" that they can go through first before they look at the listings. After they complete this "Eligibility Calculator", it'll only show them the listings that match their household size and their household income. It asks for them to put in basic information – the number of people in their household and their gross income. They can put it in per month or per year, whatever is easier for them to determine. Then hit this "View Matches" button, and when it takes them to the listings page, it will only show those that are relevant to them. This is a really good tool for service providers to be using with your clients because you will likely have this information and can help them fill it out. It can be a really nice time saver. There are never tons and tons of listings available, but it makes sure that we are streamlining the process and directing them to the ones that are the most applicable and most likely to fit their situation. You don't have to use this "Eligibility Calculator." It's just another tool to help in the housing search.

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Marie, HSF:

If the “Eligibility Calculator” is used, then this is what the listing page will look like. In this example, it was one person making \$35,000 a year and then the listings that match will be the only ones that appear. It’ll have that little green box with the Matched check mark on it too so you can be sure that it’s relevant to what’s going on in your situation.

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Marie, HSF:

There’s also the “Household Income Calculator.” This can just help folks figure out what their income is, either for that “Eligibility Calculator” or just to know. It’s nice. You can put in and update the source of the income, so wages, social security, other different types of sources. You can put in how much per month or per year that is and then it will tally up all the income by the sources for that applicant. It can save that information if the applicant creates an account. It’ll save that for them so they can access this information as they fill out their application.

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Marie, HSF:

Let’s take a look at what the listings look like. I’m actually going to exit out of this power point and open up DAHLIA so we can pull up a listing. There aren’t open listings right now. I’ll go to the DAHLIA testing site. This is what a listing is going to look like, and does look like on DAHLIA. The listings are really the core of DAHLIA. This is where all the information is being contained. You’ll see, if we jump back one page, when you first look at the listings, it’s going to show all the different opportunities that are available.

We’ll look on the actual site here. We do see quite a number of listings here. But it’s going to be organized in a way that’s going to make sense and prioritize the ones that are open and available and accepting applications at the top. So those would appear here. So it’s organized by the process. We’ve got accepting applications. If there were any, they’d be at the top. Then we see ones where the applications closed and it shows you where they are in the process. This one has had its lottery results posted and it tells you the dates when that happened. We can see the ones with different lotteries that folks might want to check in on. See how they did in the lottery. Here are the ones where the lottery results are coming soon. So it’s in that period between the application closing and before the lottery has taken place. It lets them know when the lottery happens or if there’s not a lottery. You can get a lot of information from this home screen and that’s how you navigate this.

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Marie, HSF:

Within a listing itself, this is what it’s going to look like. We have the basic property information, the address, usually there’s a photo from the developer or the leasing agent. The information that the users told us they want to see front and center, that’s what is going to appear first. Most folks are interested in what types of units are available, what is the rent, and what are the income requirements for this unit. That appears here. In this instance, we see the different types of units, the minimum income that you would need per month to qualify, what the rent amount is, and how many of each of those unit types are available for the BMR lottery.

We also have this banner on the right hand side. That shows information when the deadline is for the application, information sessions and where and when those are taking place, and open houses, and how to apply. In this case, it was a paper application, and you can download the application here. Moving forward, we’ll see options for “click here to

apply online,” and Barry will show us that process. Accessing resources, again, finding a housing counselor. Information about the timeline and the process. When the lottery takes place and what to expect. And then leasing agent information.

On the left hand side, we have more information around eligibility requirements. The maximum household income per household size to qualify for a unit. The occupancy requirement and the lottery preferences. Any feedback about language around this, please let us know. Whether rental assistance is accepted and can be used for the property. And any additional eligibility rules. Usually that’s what the leasing agent would have on top of the application. They might have credit requirements, rental history requirements, information about background checks if they’re taking place, things like that. And then Features at the bottom. What sort of amenities, the different features and accessibility information. Also, application fees. If there are application fees, it only applies to folks for whom their applications are being processed after the lottery. To submit the short-form application through DAHLIA, that’s always going to be free. We don’t make people pay to put their name into the lottery. It’s just if they get selected through that lottery and they’re moving on from there.

That’s what these listings look like and we’re trying to use that user-centric approach to make sure that the information that users want is available readily and is centralized for them.

Another thing I want to show here is DAHLIA has been designed to be used on all different types of products. So you can access it on tablets and on phones. You can see that as I’m minimizing it or making it smaller, it still has all the information from before. It’s just condensed in a different way. This is sort of what it would look like if you were to look at it on a phone. It’s all there, which is really, really cool.

Barry, MOHCD: Thanks Marie, it’s Barry again. I want to jump in just for a quick sec. I can’t help resist saying we do get a pretty high volume of applications from phones. We’re excited that that’s working. But Marie, I’m actually interrupting because we have a couple of questions back on the question on income calculators. Just a reminder that the current process with helping people find out which listings are eligible for them and also in the application process is to get them through the lottery as quickly as possible with the least effort, as Marie has pointed out. So we streamlined some things. There are certain things that we think, “Hey, do we really need to ask those questions now? Do we need to burden people with those things?” Or do we wait until “Hey, listen. You’ve done well in the lottery and we need to ask you a bunch of more stuff. And one of those things are assets. We don’t go into asset questions in the eligibility calculator. We don’t go into assets, as you’ll see in a little bit for the rental applications for BMR or multi-family. It’s a decision that we thought, “Well, okay, we think we can address this on the back-end.” There are pluses and minuses to all that. We welcome your feedback on that if you think that’s the wrong approach.

As long as we’re on the subject of eligibility and income calculators, I wanted to mention that we found something that won’t surprise you, which is that if there’s only a couple of listings open at a given time, and right now as Marie showed a minute ago there’s nothing open this very second. As we bring on multi-family listings and that whole portfolio, it’s going to be increasingly less common that you won’t see listings of any kind in DAHLIA. If there’s only a few there, maybe I just want to look at them myself, maybe I don’t need to

do that fancy eligibility calculator. Our hope is that we're going to expand that functionality in the future so that it can actually look at properties that don't have units available and lets you know, "hey, based on the information you provided us, these are properties you might want to keep a lookout for" and we might even be able to proactively let people know when openings come up in that. So just a note about where that might be going. Sorry for the interruption Marie.

Marie, HSF: No, that's great information. Thank you so much for catching those questions. I appreciate that.

Slide 23

Marie, HSF: So we talked about the lottery preferences with the listings. The lottery preferences can change based on the different listings. That information is always going to be changing in the listing. So please make sure that you and your clients are looking at that and that we're having our clients select the right preferences as they apply to them because that makes a big difference in their application. We'll talk about how the application is being built and some changes that are taking place to it to make it even easier for folks to know which of these preferences apply to them.

Barry, MOHCD: Marie, I'm sorry I'm going to jump in again because we've got a couple comments, and I appreciate a question from W and a response from Racquel. Thanks for jumping in Racquel. If you're having trouble seeing the screen that Marie is presenting from, I can make mine vary from computer to computer. The window that opened up for me when I opened this application only filled about a third of my screen. But if you hover over that screen that appears, there's a menu that comes down from the top. It's got five green buttons, the left of which might be red if you muted your microphone. Then on the lower right corner, there's a plus sign, there's a minus sign, there's a 1:1 button. And then there's this little funky button that looks like a square with four little squares within it. If you click that, it will expand your window to full screen on your computer and that should make the image bigger for you.

Slide 24

Marie, HSF: This is the really exciting part, the application process. The whole idea behind this is that we want to and we need to make this as easy as possible for folks to apply. Barry's team and the developers have sat down with people since the very beginning, specifically around this application process to make it as easy and clear and as understandable as possible and as simple as possible. We've had a lot of great success in getting it pared down to something that we feel really comfortable with having folks do as they apply for the affordable housing program.

The application process is using the TurboTax model. TurboTax was the first one to do this, but it's a process where DAHLIA sort of walks the applicant through the application process. It shows them screens that are relevant to them based on the information that they've submitted. It has this line where it shows where you're at in the process and what's to come.

There are five easy steps. The applicant will fill out information about themselves. So basic information like name and contact information. Phone numbers and email, things like that.

Household information. If they're applying with someone else for a unit, then they need to have the basic information of everyone else in the household, everyone who they're applying with and intend to live with in that affordable housing opportunity.

I'm sorry, this is flip-flopped. So income is actually going to come next after the household information. It's going to ask for the household gross income. So the pre-tax income, they need to submit that.

Then there will be a screen about selecting preferences. The way that we're trying to do this is making the preference part as easy as possible. So using the information from the address that they're including in that basic information about themselves and their household. Using their income information, and figuring out whether some of these housing preferences that apply to them. We can use the address information to see if they might be eligible for the Live/Work in San Francisco Preference or the Neighborhood Resident Preference. For OCII developments, using that income information to see if they might qualify for the Rent Burdened Preference. We're working to have DAHLIA prompt that user who qualifies for these preferences, let them know like, "Hey this is a really good thing. You live and work in San Francisco. You need to claim this preference." So making it really easy and clear around at least as many of these preferences as possible. Making it clear who is eligible to claim which of these. Now, they have to do more than just click the box that does "I want to claim this preference". The application is going to prompt them to upload required documentation for that as well, and that's going to be important because if they don't include that documentation, then they will not be able to be eligible for that preference.

It's best to start this application process when you and your client have all the information at hand that they might need. But there also are opportunities presented throughout the application process with options that they save and finish later, where someone can create an account. So if they need to go find utility bill or some documentation that proves that they qualify for a preference, they can do that and come back later, and DAHLIA will save where they're at in the application process so they can pick up right where they left off.

This final step in the online application process is Review. It does ask some demographic questions. These are optional but it really helps the city and MOHCD to have this information. So as much as your clients feel comfortable, we'd like to have them fill that out. It goes through final steps and then they submit the application. Once it's submitted, a lottery number is automatically going to be generated. So that's a basic overview of the process.

Slide 25

Marie, HSF:

Really important to highlight here: no duplicate applications. This is super, super critical! If someone applies for a BMR rental, and they apply for themselves for a studio and they apply with their sister for a one-bedroom, that's not acceptable. That's not allowed, and duplicate applications end up being removed from the lottery. It hurts their chances. It hurts their sister's chances. So please make sure that any client that you're working with, that they're only appearing in one application, whether it's individual or as a member of a household.

It's also important that folks do not both apply online and send in paper application. It's totally okay if someone tries to start online, gets stuck and doesn't finish, and feels more comfortable moving forward with a paper application. Not a problem. But there are issues and there will be consequences if they submit both an online application and a paper application.

Just so you guys know, there's a lot of logic built into this system that's flagging potential duplicates for MOHCD. They're looking at addresses and names and things like that, and it's flagging it. The Mayor's Office of Housing has staff that will then look at all these flagged applications and determine which are duplicates and which are not. Someone is still looking at these. The system isn't just automatically booting everyone out if there's a potential duplicate. But it's really, really important to emphasize this to your clients that they can only have one application.

Slide 26

Marie, HSF:

As we talked about, if a household qualifies for a preference, then the applicant is going to be prompted to upload supporting documentation. Cellphone photos are fine. It doesn't need to be PDFs or things like that. Taking photos of a bill or a copy and paste job or something like that is totally acceptable. Like we said, it's best to have the documentation ready before starting, but creating an account will allow you to pick up where you leave.

One thing to note is that there is a time out process for the online application. So if you start filling out these screen and then, let's say I get interrupted or I want to go eat lunch and then come back to this, if I leave the screen idle for five minutes or longer, it's going to boot me out. This is being done for the client's protection to make sure that their sensitive information isn't left up on the screen that could be seen by others or accessed by others. It's important to know that that is built into this, but you can always create an account, save and finish later, go do whatever it is you need to do or find the documentation you need to find and then come back to the application and finish that.

Test Application Screen 1

Marie, HSF:

So Barry, I'm going to go ahead and pass the presenter role over to you so you can walk us through what an application looks like, okay?

Barry, MOHCD:

Barry: Let's do it.

So let me get my screen optimized here for a second. Right this second we're looking at the Salesforce interface, I won't bore you with this, but this is the guts of where all this stuff works. And we have a related interface that our developers and listing agents look at that looks like this. It's much simplified, where they manage the applications that are coming in. They manage applications that've been flagged as duplicates. You've probably heard of Salesforce. I know there's that big monster tower they're building downtown of course. Some people use it for sales purposes but it's also a great database, and that's what that DAHLIA website, as we've been looking at, is built on.

Test Application Screen 2

Barry, MOHCD:

First of all let me show you in general terms. This is the regular DAHLIA that you would go to. And of course that one is **housing.sfgov.org**. But you can see up here, hopefully you can see it, up in my url bar, my website address bar, that this is a different one. Marie was in

this earlier. This is a testing site. We have a couple of them where we work on new ideas before we ever put them up on the full DAHLIA. And you're always welcome to use this one to try out the listing that we're going to do today. So if you don't see it, and I'll make sure this goes out to you, but it's dahlia-sandbox.herokuapp.com. Again, I'll make sure this goes out to you. Just remember to not ever do real applications on this site. But you can come in here and go to the listing that we're going to do today and fill in dummy applications to your heart's content. If you want to try it out or show it to other people. That kind of thing. Just one caveat, and that is because it's a testing environment, you may go and try it out someday and say, "Hey, where's that training listing that Barry showed me, it's not up there today." Because sometimes, if we're testing things, it may or may not be there but usually it's there, and you're welcome to use it. So let's go right into there.

Test Application Screen 3

Barry, MOHCD: So a second ago when Marie was showing us listings, she focused on L Seven, and again we're on a test environment. Most some of you know that L Seven has closed. So you'll see a random list of things in here, but the one you want to focus on is 450 Mason (Training). So this one should always be there. We're going to click in there, and we're going to do this together.

Test Application Screen 4

Barry, MOHCD: As you saw earlier from the full listing, when a listing has the option for online application, this button will be there – Apply Online. Increasingly, or I should say it'll rarer and rarer that you won't see this button. Our multifamily portfolio will not have online applications for a few more months as we discussed, but by the end of the summer, really pretty much anything rental should have the Apply Online option. So go ahead and click Apply Online.

Test Application Screen 5

Barry, MOHCD: So hopefully one of the things you'll observe as we go here is that this was built to be simple to use, kind of help people step by step, not put too much information on any one page. I'm excited to share that with our very first few, the first three listings, that we offered online application functionality for, all three of them reaped more than 70%, the first one was 85%, of their applications online. So that tells us that we're on to something. That people like the ability to do it online. That tells us they can figure it out. But again, we want to make sure that they can figure it out. That's why we're doing this training. And a reminder that we will always offer the paper option. So let's get started on the application. We'll go ahead click "Get Started."

Test Application Screen 6

Barry, MOHCD: As Marie pointed out earlier, there's what they call that TurboTax line. It'll just show us as we go across where am in this process and how much more have I got going on, etc. One thing too is that the order here is a little bit different. Income comes after Preferences and you caught that glitch early on a slide. We're in the process of changing that around, because if we asked about income first, some of these things we can automate, and we don't have to take people's time by asking them to fill out stuff that we already know about them. For instance, we'll know whether or not to ask them about the Rent Burdened Preference, which is something that applies to our OCII portfolio. If they've given us information about their income or things that can give us a heads up on whether or not that would be something that fits them. So this tells us what you're going to do here. We're going to ask you some questions, you get a chance to review. Reminder: only one

application per person please. And of course, fraudulent statements can cause your application to be removed. So let's hit "Next."

Test Application Screen 7

Barry, MOHCD: That's pretty simple here. First, what's your name? I know what goes out here. Let's see my birthday. Today, I'm going to be much younger than I otherwise am. Next.

Test Application Screen 8

Barry, MOHCD: It's says, "Thanks, Barry." A pretty informal and kind of personal approach here. What's my phone number? Now, notice something that happened. As soon as I filled in that last 5, I lost that option down here that says I don't have a telephone number. You can complete an application as long as you give us one way to contact you. It can be a phone number. It can be an email address. It can be a street address. Now we're going to tighten down that last thing so you'll see that change shortly where we're going to require a street address. And that's because we need that information to find out whether or not someone qualifies for Neighborhood Resident Housing Preference, including people who are homeless but who stay in that neighborhood.

So you might see slight tweak on these as it's improved. Just think of it as an app on your phone. It's working fine, and then you open it the next day and wow, it changed overnight. That's what you'll see with DAHLIA, but they'll be intuitive incremental things that we will have tested before we go and do that. So phone number. And I'm going to say that's a work number. You can provide an additional phone number if you want. Okay, I'm not going to do that now.

My work address, I'm going to put that right in. Because we're working with these preferences, which are very exacting, we need to locate them on a map and decide whether or not you qualify in particular for the Neighborhood Resident Preference, but also the Live in San Francisco Preference. We need to make sure that we get this information right. In a second, you'll see how DAHLIA confirms this. Before we do that though, I can specify that I have a mailing address. Again, I don't have to.

Do I work in San Francisco? I'm going to say yes to that. It says, "To claim this as a lottery preference, you'll need to upload documentation on a later screen." Okay, that's fine. Let's say that the kids are screaming and I can't. I have to come back to this. Well you have the option to click "Save and Finish Later." That will mean that you need to create an account in DAHLIA. Accounts are not required to submit an application ever. Because even though we're collecting a bunch of information on people, some people just don't want to create an account. Again, it's really easy to do. All you have to do, you'll see at the end here, is provide a password, confirm your email address, and you're good to go. It comes with some other great benefits like if in the future you want to apply for something else, you can actually repopulate your new application with the stuff you filled out the last time but only if you agree to make an account. But again, if you say no, that's fine. Let's keep going.

Test Application Screen 9

Barry, MOHCD: I mentioned that address thing. We found your address. Is that what it is? You just say yes. Sometimes it might come back and say, "I don't recognize that address. Can you check it?" And easy enough, it's usually a simple error that someone may have made, mistyped the street name or something. A lot of the times it can find it anyway.

Test Application Screen 10

Barry, MOHCD: Now it says, "Is there somebody else that we can reach if we can't find you?" Again, it's not a requirement. But especially for people who, let's say for you housing counselors on the phone, you have a good relationship with them and you help them a lot through this process, you can certainly provide that information right here. Case Manager or Housing Counselor. If we hit next and go there, in fact, let's do that.

Test Application Screen 11

Barry, MOHCD: What's your alternate contact name? So I'm going to say, this is my alter-ego, so I'm typing in Bart today. Where does your housing counselor work? I'm going to say that MOHCD is in the business of housing counseling. Thankfully, we're not because we couldn't do anywhere near as good of a job as you guys do. Okay, next.

Test Application Screen 12

Barry, MOHCD: Let us know how to reach your alternate contact's number. And a contact email address. Contact mailing address. I can't remember whether or not that's a requirement. I'm going to try it. Let's hit next without providing that information and let's see. Oh, it wants it, okay. I'm going to say that I work here in the office.

Marie, HSF: Marie: Sorry, this is Marie. I'm just going to interject while you're filling this part out. Just for everyone, this is where you put your information. So if your client does not have an email address, please do not put your email address in that section a few screens ago where it was asking for phone numbers, email and address for the applicant. This is the appropriate location to house that information.

Barry, MOHCD: That's great. Thank you for that. I catch a question here from Caroline Calderon. "What if an applicant is unable to provide an address? For instance, if they're living in their car." So what we want them to do, one of the screens down the road here, we're going to ask for information, particularly if Neighborhood is eligible. This is going to be standard on the applications that we do, and again, we're doing a test application today. We want to know where they live because let's say for example, and without getting into too much nitty gritty about the Neighborhood Preference, it's something that's offered on a number of our listings, it won't be on all of our listings. Federally funded listings don't like that so we go a different route. But if there's a building in the supervisor district that you live in or within half a mile of where you live, you can get a special preference in the lottery. Now what if you're parked right across the street living in your car? Caroline asked about someone living in their car. Well you get that same neighborhood preference. We'll need to have you upload a letter. As signed letter from a case manager with the appropriate letterhead and all that good stuff. But here, you can provide the information. In fact, we're going to ask for it in an even more pointed way with our next release to make sure that we get that information. And in fact, it will say that we need a specific address and it'll have a way of handling questions for homeless folks. We definitely want to get their address and if it's in their car and they're in front of approximately, let's say 142 Main Street, then put in 142 Main Street. That's the information we want. Let's move on to the next screen.

Test Application Screen 13

Barry, MOHCD: So notice how this changed up here. The "You" part is complete and we're now in the "Household." So it says, "Next we'd like to know about the other who will live with you in

the household unit.” Again a reminder, every screen, like you know what I gotta run, I’ll come back to this later. Now I’m going to go ahead and do this. So let’s say “Other People Who Live With Me”.

Test Application Screen 14

Barry, MOHCD: Before adding other people make sure they aren’t named on any application again. Reminder. Make sure you get this square. And you know that screen we were on earlier. That scary view of Salesforce. It’s pretty powerful. So we get lots of duplicate flags that we actually end up having to undo. We’re good on that but we just want to encourage people to not try and game the system because it’s not going to work out to well. Next.

Test Application Screen 15

Barry, MOHCD: So tell us about your household. We’ll there’s me, I’m already there. If I needed to change something I could do it right here. Now I’m going to go ahead and add somebody. I’m going to say, I’ll make up a name, that Missy Smith lives with me. And Missy’s date of birth. We’re both January first babies here. Now those sleuths who caught my birthday, that’s the same as here. Funny enough, one of the checks is if we get applicants that have the same birth date, we do a little check and say, “Okay, did somebody use a slightly different name, etc.” So I’m going to save that hassle here and put a different birth date. And I’m making this all up for this purpose.

Do they have the same address that you do? I’m going to say “Yes,” but if I said “No,” it gives me the opportunity to put that in there. Now, you guys know enough to know, from what we just discussed a minute ago, that matters. Because if they’re at a different address, that other address might qualify them and me, all of us together, this application, for a preference that we wouldn’t otherwise get. So we want to make sure that we get the right information. But for this purpose let’s just skip right through that. So I’m going to say they have the same address as me. Do they work in San Francisco? Let’s just say no. What is their relationship to you? You can give us some information here. If somebody is unsure, you can select other. Save household member.

Test Application Screen 16

Barry, MOHCD: Do I have anybody else to add? No, I think I’m done adding people. Okay, great.

Test Application Screen 17

Barry, MOHCD: Alright, here is when we start talking about preferences, and you’ll see the order of these guys change very soon here. But that’s okay.

So lottery preferences can be a pretty hairy subject. We know that. I like to use this phrase in a lot of contexts. The good news is, we have lottery preferences. The bad news is, we have lottery preferences. So we try and break this down and make this as simple as possible for people to understand.

So three simple steps. If you qualify, check the box for the ones you want, and then upload the document from your computer or phone that are required for each.

Reminder that based on information I provided on this sample and based on information from the listing, which may offer us certain preferences or not, these screens are dynamic. You might go through an application with somebody and go, “Okay, I know the next screen

is going to be blank.” And then you go, wait that screen didn’t come up. It’s probably because it’s a preference that doesn’t apply to this listing or it’s a preference that doesn’t apply to the individual that you’re sitting with because of information that they’ve already input on the application. So don’t worry about that, but if you see something, you go “Wait, something is wrong here,” of course we want to know about that. But usually we’re pretty on top of these things.

Test Application Screen 18

Barry, MOHCD: So let’s get started with Preferences. Based on the things, you qualify for the following lottery preferences. Now what I notice here is that we should have a Live in San Francisco Preference. Because we’re on the test environment, it’s not there so forgive me for that. But it should be right here. There would be a box here and I would click a box that says Live in San Francisco. Or you have the option to say “I don’t want this Preference”.

Because what we’re trying to do is, first of all, we want to say Preferences are a big deal so please don’t skip this screen. So you’ll notice some things that’ll change with this new release where we change some of this language that says, “You really want to check these things if they apply. They’ll really matter.”

But there’d be a box here where they click it and then it would say, “Okay, I need you to upload something that tells me you live in San Francisco,” and they can take a picture from their phone. They can put it on their phone and they can upload the document. It’s just something that shows, like it says here, the correct name, a date within 45 days of the application, and showing the address where you live or work in San Francisco.

Or they can say, “You know what? No. I don’t want to upload anything. I don’t want to deal with this. So I’m going to say no.” Again, this is not something we recommend, but okay. Since I can’t say “Yes” on this funky screen, I’m going to say “No.” Again, sorry for that.

Test Application Screen 19

Barry, MOHCD: Now you’re here and then it shows me here’s some other things that have special certificates. Wait a minute. If you haven’t heard of these, then you probably don’t have one. But wait a minute, I think I have one but I’m not sure. Let me hit this “Read More” button. Oh okay, great, I see. That’s what that is. But wait, I’d still like to find out more about that, and there’s a link. It’ll take us to the MOHCD website. It’ll tell you more about our Housing Preference Programs and some more details on each of those. “Okay that’s fine, I think I know what that is. That’s right. We were displaced as a family from the Fillmore area. We got that.” Okay great. Who has that preference? It’s Missy who has that actually.

Displaced Tenant Housing Preference, I don’t know what that is. I don’t know that, I guess I don’t have that, that’s fine. So we select “Miss” and on we go.

Test Application Screen 20

Barry, MOHCD: Now for the Certificate of Preference and the Displaced Housing Preference, since both of those are certificates that we track in our office, we’ll have a list of those folks. We won’t ask you to upload a picture of your certificate or anything like that. We just note, “Yup, they said they’ve got it. We’ll confirm it.” And you’re good with that.

This next screen, notice we've moved into income now. "Does anyone in your household receive any vouchers or rental subsidies?" Now, this is a super general question. It doesn't need to know what kind of voucher it is. It doesn't need to know details. It's important though, because we have a check that says, "Wait a minute, does this person's reported income match the requirements for this listing." But we suspend that here if you say "Yes." If you say "Yes," it says, "Okay, I'm not going to worry about this income calculations because vouchers usually just make it+ work and we're going to move on to the next.

Test Application Screen 21

Barry, MOHCD: Let's move to income. This screen looks an awful lot like the "Income Calculator" that you did before earlier. Let's see here. Income from all sources. Again, pre-tax. Only provide an estimated total. The actual total will be calculated if you're selected in the lottery. Again, what we were talking about earlier about not worrying about assets and those kinds of things. We just need what's the general picture here.

Test Application Screen 22

Barry, MOHCD: Now we get into the Review section. Here it's going to ask us for some demographic information. These questions are optional, and they are strictly optional. We sure would like to get them though because it helps us understand, "You know what, gosh. It turns out that gay persons of Latino ethnicity, etc., have a harder time applying." It really helps us find out where we need to focus. So this is really valuable information for us. It is disconnected from someone's name. Again, this is just a general aggregated form. But please encourage your clients to participate here.

What's your gender? Male. Orientation? I am gay. Ethnicity? I am not Hispanic/Latino. What best describes my race? Let me go down here. White, there it is. How did I hear about this listing? Well, let's see, there was that flyer. And a friend told me. Oh, and of course my housing counselor. You know, I think I saw it in the newspaper too. Whatever applies.

Test Application Screen 23

Barry, MOHCD: So now's the chance to review the things that I submitted. Alright, a nice clean form there. Yup, yup, that's right. Oh no, wait, that phone is wrong. Let me edit that real quick. Okay, let me see. Go back here. I'm going to my phone, I'm changing my phone number. Now, watch what happened. I jumped all the way back to "You." Okay, do I have to go through all these screens to go back to where I was? No, the answer is I can go up here and click "Review" again and I go back to where I was. Okay, confirm.

Test Application Screen 24

Barry, MOHCD: Now it says do you want to do this with or without an account here. I do not want to do that, so I'm gonna say "Confirm Without An Account."

Test Application Screen 25

Barry, MOHCD: So here are the terms. You'll notice I pushed this date way out. Here's how it works. If your application is chosen, etc. Okay, is this true? I agree. Wonderful. And then you submit.

Test Application Screen 26

Barry, MOHCD: Now, it's going to confirm if the application was submitted, and this environment is a little bit slower, by the way, than our standard DAHLIA so it's taking a second here.

Okay, thanks. We've got your application. Good. And look at this trick. I get my lottery number right away. I'll also be sent an email with it, but if I didn't provide an email that won't happen. So I can write this down, and that is my lottery ticket number.

A functionality that's happening with select listings, and it'll happen with all of them, is that within hours of the lottery, you can go back into that listing and click a button and find out exactly how you did in the lottery by entering this number. Preference by preference. General ranking. All that good stuff will be there for you so it's important to keep this number, and if they haven't given an email, to write it down somewhere.

Here's what to expect next. And again, here's an option to create an account. It's going to be good if you do that. "No, I don't want to." Are you sure won't want to create an account? Again, we want people to, but if they don't, okay. I'm going to say I don't want it. And then it'll drop me back to the regular site and we're done.

Marie, HSF: Thanks so much Barry, that's super helpful.

Barry, MOHCD: Sure

Marie, HSF: Great. And again, as you guys are using these applications, filling them out with your clients and the folks that you work with, if you brush up against any issues, questions, concerns, suggestions, the Homeownership SF email is going to be in one of the later slides. So feel free to connect with us, and we can help you through that and relay any feedback you have with Barry and MOHCD.

Slide 27

Marie, HSF: Again, just really quickly. What to expect after applying. We saw a lottery number was created. That gets emailed if there was an email filled out in the application. You'll also see the lottery date and time. Again, applicants are not required to attend these lotteries any longer, and if they go into those listings where it shows that the lottery dates have passed, there's an option to put in that lottery number and see how they did.

Slide 28

Marie, HSF: Just a few notes about paper applications. Again, as we said before, paper applications are never going away. That's always going to be an option available to folks who are applying for these opportunities. We understand that not everyone is comfortable or has access to do this online, so this is always going to remain an option.

If that applicant wants their lottery number returned to them by mail, then in their application they need to include a self-addressed stamped envelope. If they don't know what that means, please walk them through that. But basically, they need to provide the means by which their lottery number is going to be sent back to them. So that needs to be included in the application. They don't need to have their lottery number sent back to them. If they just want to wait and see if they get notified about next steps after the lottery date takes place, that's perfectly acceptable too. But if they do want to track along with the process as it progresses, then they need to include that envelope.

All applications must be received by the deadline. So if the deadline is 5PM, you have up until 4:59:59 PM to submit. Hit that finish button on the online application. For paper applications, the application has to be received at the PO Box by that deadline.

All paper applications are going to start being sent to a specific PO Box, not to the leasing agent or the developers. They're not going to be receiving those moving forward or in the near future anyways. Look at the listings for the interim period to see where to send them. For the PO Box, that's the Mayor's Office of Housing. Their PO Box. They're going to go there, 5PM on the date of the application deadline. And if that application isn't there, it's not going to be entered into the lottery, and it's not going to be processed so post-marked is not sufficient. It needs to be received by that deadline.

Slides 29 & 30

Marie, HSF:

Just talking a little bit more about creating an account. As Barry said, there are lots of prompts all over the place, especially around the application, to have folks create that account, and there are a lot of benefits to it. Some of the big benefits are that they can save that current application that they're working on and if they need to come back with further documentation or they just can't finish it in one sitting, they can come back, save their progress and start from there and finish later. It stores all the information for future use. So if I apply for one application for this week and another listing comes up in three months and I want to apply for that, I can access my old application and use that to populate some of the information into the new application, making it a lot easier for me to apply at another time to a different listing

It serves as a centralized place where I can access my old applications. I can look through them. I can see my lottery number again. If I lost that email and I didn't write it down after I submitted my application, it's always saved in my DAHLIA account.

And then you can save favorite listings. By each listing, there's a circle with a heart button and you can click on that. That means that it's a favorite of mine. Those will all be saved in my account.

Again, like Barry said, it's perfectly fine if folks don't want to create an account. We understand that some people just see it as another account and another password to remember, and that's okay. We understand and we respect that. But again, there are a lot of benefits to signing up with an account on DAHLIA.

Slide 31

Marie, HSF:

There are a few ways to create an account. You can create an account from the Home page or, like Barry was showing, you can create an account while you're in the application. So, either by clicking the "Save and Finish Later" button if you're in the middle of an application or at the end when it prompts you to create an account. The nice thing about creating an account when you're doing it from an application is you don't have to fill in all this information.

If you're doing it from the Home screen by clicking that "Sign In" button, this is what it's going to ask of you to create an account. So you're going to need to provide your name, your date of birth, your email entered in twice, and a password. Because you're already

putting in all of this information in if you're applying and filling out an application, it's not going to ask you for that if you're creating an account through the application process.

Again, just to note, please do not put your name as their case manager or counselor here for their account. This should be a personal email address for that client because we want them to be able to access it any time, and you're probably working with a lot of different folks, and you don't want your email tied up with one particular person.

Slide 32

Marie, HSF:

When you create an account, when you click that "Sign In" button and you sign in through DAHLIA, this is what the dashboard looks like. It will show you your past applications under "My Applications." Again, it will have your lottery numbers. You'll have the listings for the properties that explain the deadlines and the dates for the process. You can update your account settings. Maybe I want to have a different email linked to this account. I can change that. I can change my password. I can access "My Favorites" that have gotten up here. And then these same ones from the Home screen, the "Browse Properties" and the "Get Assistance" if I need those additional resources.

Slide 33

Marie, HSF:

Alright, so that's DAHLIA in a nutshell. If you have questions --- Oh, I'm sorry it looks like there was a question that came up.

"So if a client applies for multiple properties simultaneously, but with different household sizes per listing, will that raise questions or result in disqualification?" So as Barry mentioned, that's perfectly fine. There's no problem with that. The issue comes if you're submitting multiple applications for the same listing. If, for example, that L Seven listing was still active and accepting applications. If I applied for a studio and I applied with Racquel for a two-bedroom, that's when that would get flagged. But if I'm submitting applications to different listings and the household sizes change and things like that, that's perfectly fine. Good question.

Any other questions that come up, issues that you're seeing, feedback for this site, please reach out to us at info@homeownershipSF.org. We're happy to provide support and assistance on this and to help communicate your concerns and the community's needs to the Mayor's Office of Housing so we can continue to iterate on this product and make it the best that it can be.

Slide 34

Marie, HSF:

We welcome any feedback that you have about this and encourage you, if you're interested, to join that DAHLIA Task Force that meet once every one to two months that Barry mentioned. If you're interested in joining that and getting the invites for that and the information from the Task Force, please reach out to myself at info@homeownershipSF.org

Maria, MOHCD:

Hey Marie, this is Maria Benjamin. I'm sorry to interrupt. I just wanted to make sure that everybody understands the PO Box thing and that there were no questions about the PO Box. I know you went over it. Just so that folks really understand that there is no more line outside the building around the block. That people will not be able to turn in an application in person and that the only way to turn in your application if it's on DAHLIA, is through DAHLIA or through the PO Box with a self-addressed stamped envelope so that you can get

your lottery ticket number back the paper way. And I'm sorry if I'm going over it too much, but I just need to make sure that folks get that.

Marie, HSF: No, that's great. Thank you so much for reiterating that. It's a really important and big change to the application process.

Any other questions, feel free at this point to unmute yourself or you can type them in the chat. We've got a few more minutes to take in questions that folks do have. Otherwise, I have recorded this so I can send out this recording to folks after this webinar. It'll be available in about a day or so. We will make them available for any of your colleagues who were not able to attend today but want access to this information. That is going to be another resource available.

Barry, MOHCD: Marie, there was a question we had earlier about whether or not we'll have this available as a transcription for folks who are hearing impaired, and I don't know if we're able to do that, but why don't we see if we can look into that and see if it's possible. And I know you did send out the PDF today that gives an overview of stuff that might be helpful for folks in that situation. But I just wanted to mention that out loud to audience because I think it's a good question and a good idea and we'll see what we can do.

Marie, HSF: Yeah, definitely. Thanks for letting me know. We'll definitely look into seeing what we can do about that and making sure that there are resources available for that community and those needs.

Barry, MOHCD: Well on behalf of the development team, you did a great job Marie. Thanks very much and thanks everyone for attending today. It's an honor to be doing this work for the community and we're super glad for all the work you do, so thanks for joining us.