

Mayor's Office of Housing and Community Development  
City and County of San Francisco



**London Breed**  
Acting Mayor

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Director

**January 12, 2018**

**Notice of Availability of 2017 Annual Monitoring Report Form ("AMR-EZ")**  
(plus reminders of Serious Incident Protocol and marketing procedure)

MOHCD is pleased to announce the availability of the Annual Monitoring Report form ("AMR-EZ") for Reporting Year 2017 (RY2017). The AMR-EZ is the annual report that must be completed for certain projects that have been financed by or through the Mayor's Office of Housing and Community Development (MOHCD) or the former San Francisco Redevelopment Agency. The form is now available to be downloaded from the [Asset Management page](#) of the MOHCD web site.

Deadline: The report is due by the close of business on February 15. Please refer to MOHCD's policy on "[Deadlines for Annual Monitoring Reports](#)" and requests for extensions, which is posted adjacent to the AMR-EZ reporting form on our web site.

Training: A training session on how to complete the AMR-EZ will be held at MOHCD on January 30 from 9:30 to 11:00 a.m. See below for more information.

**Completion and Submission Instructions**

The Annual Monitoring Report (AMR-EZ) consists of the following two parts:

I. [AMR-EZ\\_RY2017 - project name.xlsx](#) – This is a Microsoft Excel spreadsheet that is comprised of the following worksheets:

- |                                       |   |
|---------------------------------------|---|
| Instructions                          | D3. Demographic Summary                   |
| A. Property                           | E. Operating Statement & Reserve Activity |
| B. Transitional Programs Only         | F. Services Funding                       |
| C. Eviction Data                      | G. Narrative                              |
| D1. Occupancy & Rent Info (revised)   | Completeness Tracker                      |
| D2. Demographic Information (revised) |   |

Provide all relevant information that is requested in worksheets A-G, as applicable. Based on certain data inputs on worksheet A, the reporting form will indicate whether or not worksheets B and E must be completed and whether or not insurance documentation must be submitted. Use the Instructions to help you complete each worksheet, and use the Completeness Tracker to help you to determine 1) which worksheets to complete, based on certain data inputs on worksheet A, 2) when each required worksheet is complete and 3) whether or not you must submit documentation of insurance with the report.

Use Worksheet G (Narrative), Question #1, to explain any data provided on other worksheets that may be unclear or better understood with additional information. Also, use Question #2 to describe any affirmative marketing that you conducted for the project during the reporting period.

Submit this report as an Excel file only; do not convert it to pdf or another file type. Do not overwrite any validations for any of the cells, alter any formulas or add or delete any rows or columns. Changing the format of the AMR-EZ without MOHCD's prior approval will render the report invalid and unacceptable. If you need to revise the form in order to successfully complete the report, submit a request to [moh.amr@sfgov.org](mailto:moh.amr@sfgov.org).

II. Waiting List – Submit a copy of the project's waiting list that is current as of the date of submittal. The waiting list must include the following information for each person or household who has applied to live at the project and is still waiting to be considered for an available unit:

- name of head-of-household
- contact information
- date of application,
- number of people in the household,
- stated household income and
- desired unit size.

**IMPORTANT:** the waiting list must be redacted to exclude any private information that should not be shared publicly, for example, Social Security numbers, ID numbers from other forms of identification, information related to disabilities or other health conditions. Any waiting list that is submitted with such private information will be returned, to be properly redacted and resubmitted. Please confer with legal counsel and let MOHCD know if you have any questions prior to submitting a copy of the waiting list. This requirement is not applicable to transitional housing projects, residential treatment programs, shelters, group homes or permanent supportive housing for homeless people that is leased through a closed referral system.

Completed AMR-EZs must be submitted electronically, via one email message per project, to [moh.amr@sfgov.org](mailto:moh.amr@sfgov.org) by February 15.

### **Updates to the AMR-EZ Reporting Form**

The AMR-EZ reporting form has been revised since last year, as follows:

- Worksheet D1 – Occupancy & Rent Info: A new column has been added, Column U, that automatically calculates the rent burden of a specific household, using the data inputs for annual income, tenant rent and utility allowance. This information is intended to help the user identify data entry errors or severely rent-burdened tenants who may need additional support.
- Worksheet D2 – Demographic Information: Three new fields have been added to this worksheet for reporting the gender, sex and sexual orientation of the head-of-household of a unit. This information is required only for households who occupied their units after 6/30/2017. For more information, please refer to the [Notice of New Reporting Requirement for Sexual Orientation and Gender Identity](#).

### **AMR-EZ Training – January 30, 9:30-11 a.m.**

To facilitate completion of the AMR-EZ by project sponsors, MOHCD will conduct a training session on Tuesday, January 30, from 9:30 to 11:00 a.m. in our office at 1 South Van Ness Avenue, 5<sup>th</sup> Floor, Room 5080. We strongly encourage the primary staff person responsible for completion of the report to attend and to bring a Wi-Fi enabled lap top computer. Space is limited. Please RSVP to Ricky Lam at [ricky.lam@sfgov.org](mailto:ricky.lam@sfgov.org) or 415-701-5542.

### **Marketing of Available Units and Waiting List Openings**

Before advertising the availability of units for lease in a project or the opening of the waiting list, owners and property managers must notify MOHCD of this action by completing a [Marketing Plan Template](#) and submitting it to the assigned staff person on MOHCD's Asset Management and Compliance Monitoring team. The template is available on the [Asset Management page](#) of our web site. Once the marketing plan is approved, MOHCD will post information about the available units or opening of the wait list on this [page of our web site](#). General information for people seeking affordable housing in San Francisco can also be found on our web site at [this location](#).

### **Serious Incident Protocol**

To ensure that MOHCD is kept informed of serious incidents that occur at projects financed by this office, we have established the following protocol for reporting serious, negative events such as accidents, criminal activity or equipment failure. The report should be filed only after emergency procedures have been followed and the situation has been stabilized.

The Mayor's Office of Housing and Community Development requests that owners of projects financed by this office notify us immediately if a serious incident occurs at their properties and meets one or more of the following parameters:

- Involves serious injury or death
- Is a serious, violent crime that involves a major police action (e.g. shooting)
- Causes the building or a significant number of units to be off-line
- Requires a resident to move out of a unit one month or longer
- Damage to the building is significant enough to require the use of reserves

The owner should notify the MOHCD asset manager assigned to the project and provide the following information:

- The date of the incident
- A description of the incident
- A description of what has been and is being done in response
- The name, phone and email of the staff that should be contacted if there are questions
- Confirmation that 1) the property insurance is current and 2) the insurance company has been contacted; a brief summary of their response, if available

- Statement of whether or not the organization plans to use the project's reserves to pay for corrective action