

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



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**Notice of Availability of 2016 Annual Monitoring Report Form ("AMR-EZ")
Announcement of Serious Incident Protocol**

Annual Monitoring Report (AMR-EZ): The AMR-EZ form for Reporting Year 2016 (RY2016) is now available. 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 can be downloaded from the [Asset Management page](#) of the MOHCD web site.

New Waiting List Submittal Requirement: To aid the City in its efforts to ensure that the allocation of MOHCD-financed affordable housing resources is conducted in a consistent, fair, appropriate and inclusive manner, MOHCD is now requiring all sponsors to submit the current version of a project's waiting list with the AMR-EZ. See below for details.

A training session on how to complete the AMR-EZ will be held at MOHCD on January 31 from 9:30 to 11:00 a.m. See below for more information. The report and the Certification of Compliance form are due by close of business on February 15.

AMR-EZ Completion and Submission Instructions

The RY2016 AMR-EZ 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 | Completeness Tracker |
| D2. Demographic | |

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 Question #1 on worksheet G (Narrative) to explain any data provided on other worksheets that may be unclear or better understood with additional information. Also, use Question #2 on worksheet G 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 is not allowed. If you need to revise the form in order to successfully complete the report, submit a request to moh.amr@sfgov.org.

Completed AMR-EZs must be submitted electronically, *via one email message per project*, to moh.amr@sfgov.org by February 15.

Extension of AMR Deadline

Project sponsors may request an extension of the deadline for submitting the AMR-EZ if they need additional time to complete the report. Requests must be submitted and will be considered in accordance with the following policy.

1. All requests must be submitted in writing via email to MOHCD no less than 1 week before the deadline (i.e., by February 8th):
2. Any extension requests that are approved will be for 1 month only, i.e., until March 15th:
3. Requests must explain and justify the need for the extension, and the reasons must be due to circumstances beyond the sponsor's control. The request must also state what the current status of the report is and what must be done to complete it. In addition, the sponsor must commit to a specific plan of action to ensure timely submission of the report in future years.
4. Extensions may be granted or denied at the discretion of the MOHCD staff person who is assigned to monitor the project in question. MOHCD staff will respond to the request for extension within 5 business days upon receipt of the request.
5. Any reports received after the regular deadline or the extended deadline ("final submission deadline") will be considered late.
6. Sponsors who miss the final submission deadline will be required to attend the AMR-EZ training the following year.
7. MOHCD will track how timely sponsors are in meeting the AMR-EZ reporting deadlines and may assign ratings. MOHCD may use these ratings when evaluating any proposals submitted to MOHCD by the sponsor, especially any requests for future MOHCD funding. MOHCD may also publish these ratings.

Updates to the AMR-EZ Reporting Form

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

- Worksheet A – The “Reporting Period” is now entered in advance for all projects as “1/1/2016-12/31/2016.” Also, the order of items has been changed to improve the flow of information, and a new item has been added—“Target Population.”
- Worksheets D1 – Previously known as worksheet D. It has been shortened by moving the data related to female-headed households, elderly households, number of children and disability to new worksheet D2.
- Worksheet D2 – New worksheet where ethnicity, race and other demographic information must be entered for each tenant household.
- Worksheet D3 – New worksheet where summaries of demographic information for a project are auto-generated, based on data entered on worksheets D1 and D2.
- Worksheet E – Includes two new fields where users must enter the start date and end date of the project’s business year.

AMR-EZ Training – January 31, 9:30-11 a.m.

To facilitate completion of the AMR-EZ by project sponsors, MOHCD will conduct a training session on Tuesday, January 31 from 9:30 to 11:00 a.m. in our office at 1 South Van Ness Avenue, 5th Floor, Room 5080. We strongly encourage the primary staff person responsible for completion of the report to attend. Space is limited. Please RSVP to Ricky Lam at ricky.lam@sfgov.org or 415-701-5542.

New Waiting List Submittal Requirement

Along with the AMR-EZ, please 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. Prior to submittal, 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. Please confer with legal counsel and let MOHCD know if you have any questions prior to submitting a copy of the project’s waitlist. 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.

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