

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



**London N. Breed**  
Mayor

**Eric D. Shaw**  
Director

**December 23, 2020**

**Notice of Availability of 2020 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 2020 (RY2020). 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 or its successor, the Office of Community Investment and Infrastructure. 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 1. 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: Due to the COVID-19 pandemic, there will be no in-person training session on how to complete the 2020 AMR-EZ, however on-line training is available. See below for more information.

**Completion and Submission Instructions**

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

I. AMR-EZ\_RY2020 - project name.xlsx – This is a Microsoft Excel spreadsheet that is comprised of the following worksheets:

Instructions  
A. Property

D3. Demographic Summary  
E. Operating Statement & Reserve Activity

B. Transitional Programs Only  
C. Eviction Data  
D1. Occupancy & Rent Info  
D2. Demographic Information

F. Services Funding  
G. Narrative  
Completeness Tracker

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 1.

### **AMR-EZ Training – On-Demand Videos**

To facilitate completion of the AMR-EZ by project sponsors, MOHCD has created training videos that provide step-by-step instructions on how to complete the Excel reporting form and how to submit the report overall. There are ten video modules that vary in length from two to 30 minutes and may be viewed on-demand from the [Asset Management page](#) of the MOHCD web site. We strongly encourage all persons who are involved in preparing the AMR to watch the videos. If you experience any technical difficulties with accessing and viewing the videos, please contact Ricky Lam at [ricky.lam@sfgov.org](mailto:ricky.lam@sfgov.org) or 415-701-5542 (messages only).

### **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, under "Marketing Requirements for MOHCD-Financed Multifamily Rental Projects." Once the marketing plan is approved, MOHCD will post information about the available units or opening of the waiting list on [DAHLIA](#) – the City's internet portal where members of the public may get information and apply for affordable housing. General information for people seeking affordable rental 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.

MOHCD requests that owners of projects financed by this office notify us in writing 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

**Asset Management Team**

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