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

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Mayor

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Director

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2023 Annual Monitoring Report Form EZ ("AMR-EZ") – Call for Submissions
(plus, revised Serious Incident Protocol, information about housing counseling
services for annual income recertifications and marketing reminder)

The Mayor's Office of Housing and Community Development (MOHCD) is pleased to announce the availability of the Annual Monitoring Report EZ ("AMR-EZ") form for Reporting Year 2023 (RY2023). The AMR-EZ is the abridged form of the Annual Monitoring 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 Compliance Monitoring page of the MOHCD web site.

To determine the projects for which you must provide an AMR-EZ, please see this list.

Deadline: The AMR-EZ is due by the close of business on February 1, 2024. 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.

Completion and Submission Instructions

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

I. AMR-EZ_RY2023 - 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	Completeness Tracker
D2. Demographic Information	

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.

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.

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 by February 1, 2024.

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 [Compliance Monitoring](#) 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 or 628-652-5813.

Serious Incident Protocol – Revised to Include Systems/Equipment Failure

MOHCD has revised the [Serious Incident Protocol](#) to include in the definition of "serious incident" the failure of major systems or equipment in a building. If the elevator service, heat, hot water, electricity, cooking fuel or life/safety system is offline for more than 24 hours, project owners shall notify MOHCD of the incident in accordance with the revised protocol. The notification must be in writing and provided as soon as possible after the incident has occurred. The revised protocol also calls for the notification to include a description of how the needs of the affected tenants will be met while the problem is being corrected.

Housing Counseling Services – Available to Support Annual Income Recertifications

The housing counseling services funded by MOHCD are available to assist your tenants with the annual income recertification process. To promote the availability of this service to your residents, we ask that you include the following language in all annual income recertification notices:

> **If you need help, please contact HomeownershipSF.**
> Si necesita ayuda, póngase en contacto con HomeownershipSF.
> 如果您需要幫助，請聯繫 HomeownershipSF.
> Kung kailangan mo ng tulong, mangyaring makipag-ugnay sa HomeownershipSF.
> 415.202.5464 (phone/teléfono/電話/telepono) --- info@homeownershipsf.org (email/correo electrónico/電子郵件)

Marketing Procedure for 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 [Compliance Monitoring](#) page of our web site, under "Marketing Requirements for MOHCD-Financed Multifamily Rental Projects." Owners and managers of projects funded under the Small Sites Program or the Housing Preservation Program should follow the procedures in the [Marketing and Leasing Manual](#) for those programs and use the [related forms](#).

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 housing in San Francisco can also be found on our web site at this location.