

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



London N. Breed
Mayor

Daniel Adams
Director

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Annual Occupancy Report XL (“AOR-XL”) – Call for Submissions for 2021, 2022 and 2023

The Mayor's Office of Housing and Community Development (MOHCD) announces the availability of a new, required reporting form, the Annual Occupancy Report – XL (“AOR-XL”).

The AOR-XL is the newest tool that MOHCD uses to verify compliance by the affordable housing developments that are operating subject to the contractual requirements of MOHCD or the former San Francisco Redevelopment Agency or its successor, the Office of Community Investment and Infrastructure.

In late 2021 and early 2022, MOHCD's notices requesting submission of the 2021 Annual Monitoring Report (AMR) included an acknowledgement that occupancy and eviction reporting had been removed from the AMR in anticipation of the creation of a new online reporting system, the Annual Occupancy Report, or AOR.

Because it is a new system, the AOR was created and launched in “beta” mode in 2023, with a limited number of agencies invited to report via the AOR system. While the core of this system is working as planned, some aspects of the design and overall speed of the system need improvement. Work to improve the system has begun, and we hope to launch the AOR portfolio-wide by 2025.

The delay in implementing the AOR portfolio-wide created the need for an interim reporting solution, through which MOHCD can collect occupancy and eviction data for years 2021, 2022 and 2023 for each of the developments that are not reporting in the AOR beta system. The AOR-XL is the interim solution, and it was so named because the design mirrors the basic features of the online AOR system.

Recipients of this communication should review the list of developments that are subject to this reporting requirement, and complete and submit one report for each of the developments shown on the list. The AOR-XL report template and list of developments subject to reporting are posted on the [Compliance Monitoring](#) page of the MOHCD web site.

Deadline: The AOR-XL is due by the close of business on Thursday, August 15, 2024.

Completion and Submission Instructions

The Annual Occupancy Report XL (AOR-XL) consists of a Microsoft Excel spreadsheet (AOR-XL – project name.xlsx) that is comprised of the following worksheets:

- | | |
|------------------------|---------------------------------|
| Instructions | 3a. Occupancy & Rent Info-2023 |
| 1. Identifying Info | 4. Demographic Information-2023 |
| 2a. Eviction Data-2023 | 3b. Occupancy & Rent Info-2022 |
| 2b. Eviction Data-2022 | 3c. Occupancy & Rent Info-2021 |
| 2c. Eviction Data-2021 | Completeness Tracker |

Provide all relevant information that is requested in worksheets 1-4, as applicable. Data inputs on worksheet 1 will determine which subsequent worksheets must be completed. Review the Instructions prior to completing each worksheet, and use the Completeness Tracker to help you to determine 1) which worksheets are required, and 2) when each required worksheet is complete.

Submit this report as an Excel file only; do not convert it to pdf or another file type. Do not work on the file using any other software than Microsoft Excel. 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 AOR-XL 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.

Completed AOR-XLs must be submitted electronically, via one email message per project, to moh.amr@sfgov.org by August 15, 2024.

AOR-XL Training

To facilitate completion of the AOR-XL, MOHCD will offer a training on July 11, 2024, at 9:30 a.m., which will cover step-by-step instructions on how to complete the Excel reporting form and how to submit the report overall.

Reminder – Demographic Information Collection Form

Please be reminded that all owners and managers of MOHCD-funded affordable housing projects must use the [MOHCD Demographic Information Collection Form](#) to collect important demographic information about their tenants, including race, ethnicity, language, disability, number of seniors, children and veterans, sexual orientation and gender identity. You must collect this information only once for each household, but you must offer each household an opportunity to update the information once annually during their income recertification. For more information, please see [this page of MOHCD's web site](#).