COMPLIANCE ANNUAL REPORTING GUIDE

City of Boulder, Housing & Human Services



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Purpose

The purpose of the Annual Reporting Guide is to provide guidance on the reporting requirements associated with the City of Boulder, Housing & Human Services supported projects and permanently affordable rental housing units. The guide is designed to help Grantees, Owners and Managers understand the reporting requirements that apply to specific activities, programs and projects.

Ongoing compliance monitoring for permanently affordable units is administered by the Housing Sr Program Manager. Project specific inquiries should be directed to the Housing Project Manager assigned to your project or permanently affordable rental housing property. All Housing personnel can be reached at 303-441-3157.

Reporting Requirements

The City of Boulder requires all Grantees, Owners and Managers of city-supported projects to submit quarterly and annual performance reports. These reports serve as a valuable tool to evaluate progress in meeting specific objectives and ensure compliance with applicable regulations, rules and requirements. The information collected is also used to report outcomes to the U.S. Department of Housing and Urban Development (HUD), Boulder City Council and the community.

OUARTERLY PROGRESS REPORT

The Quarterly Progress Report (Appendix A) is required for all "open" projects that have not yet expended the entirety of the funds awarded to the project. The purpose of the Quarterly Progress Report is to track progress toward satisfying the funding conditions detailed in the executed funding agreement, evaluate progress towards meeting the project objectives and ensure compliant use of all funds.

If the project has executed a funding agreement but has yet to seek reimbursement of any project expenses, it is only necessary to complete **Parts I and II** of the report. In these sections, please describe the project status, any progress made in satisfying funding conditions and critical milestones. If the project is experiencing any complications or obstacles, please provide an overview of these factors and the actions to be taken to address the factors impeding the progress of the project. Please be concise and explicit.

Grantees, Owners and Managers must also complete **Part III** of the Quarterly Progress Report. This section informs the Project Manager how the project is progressing, and the amount of funds expended to date.

The Quarterly Progress Report is due every quarter (four times a year) until the project is completed and all funds have been fully expended. This report must be submitted within thirty (30) days of the end of each quarter. The reporting period and submission timeline is as follows:

Quarterly Report	Reporting Period
First Quarter	January – March (Due 4/30)
Second Quarter	April – June (Due 7/30)
Third Quarter	July – September (Due 10/31)
Fourth Quarter	October – December (Due 1/31)

ANNUAL BENEFICIARY REPORT

Only rental housing properties that provide overnight shelter or short-term transitional housing are required to submit an Annual Beneficiary Report. All *other* rental properties must submit an Annual Tenant Report.

The Annual Beneficiary Report (Appendix B) is required for all community development projects and some rental housing properties that have fully expended all of the funds allocated to the project. This report summarizes the number of households or "beneficiaries" that h a v e benefited from services provided by the project/program. This report must be completed upon completion of the project and annually thereafter. This report must be submitted no later than January 31st of each year.

ANNUAL CERTIFICATION OF COMPLIANCE

As part of our Annual Risk Analysis and Desk Review for the Permanently Affordable Rental Housing Program, the Owner/Property Manager must complete and submit an Annual Certification of Compliance (Appendix C) on an annual basis. This report serves as a snapshot of a property's compliance with applicable rules. It is required for all permanently affordable rental housing units under Covenant with the City of Boulder.

AFFIRMATIVE MARKETING COMPLIANCE REPORT

The Affirmative Marketing Compliance Report (Appendix D) is a tool used to monitor compliance with Affirmatively Furthering Fair Housing requirements. It is required for all permanently affordable rental housing units under Covenant with the City of Boulder.

ANNUAL TENANT REPORT

All multifamily permanently affordable rental housing properties are required to submit an Annual Tenant Report by January 31st of every year. This report serves as a tool to ensure compliance with the terms outlined in the Covenant and Rental Compliance Manual.

Please see the Annual Tenant Report Process Manual (Appendix E) for additional information on how to complete and submit this report.

ANNUAL VACANCY REPORT

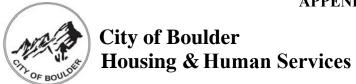
All multifamily permanently affordable rental housing properties are required to submit an Annual Vacancy Report (Appendix F) by January 31st of every year. This report serves as a tool to inform Compliance Staff and the Housing Advisory Board of the reasons why residents vacate permanently affordable rental units throughout the year.

REPORT SUBMISSION

All Grantees, Owners and Property Managers will receive an email within the last two weeks of December to inform and request all required year-end reports. The email will include a copy of the Annual Reporting Guide, copy of required reports and any additional details necessary regarding the reporting requirements specific to the project/program.

It is important to note that all partners are required to complete the reports in the format provided in the email. Once all required reports have been completed, please submit the reports via email to the Housing Sr Program Manager at cit@bouldercolorado.gov.

APPENDIX A



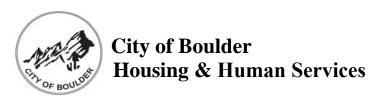
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1st Quarter Progress Report

Part I. Project Information	
Grantee/Owner Name:	Project Name:
Staff Completing Report:	
Reporting Period: Jan 1 st – Mar 30 th Report Year:	Fund Year: Funding Amount:
Part II. Narrative (Describe project status, note progress sati	isfying funding conditions)
Part III. Housing Projects with Covenants (Project	s with housing units only)
Total # of Units in Project	
Total # of Affordable Units in Project	
# of Affordable Units Currently Under Construction	
# of Affordable Units Completed	
# of Affordable Units Sold	
# of Units Qualified as Energy Star	
# of Units Section 504 Accessible	
# of Units Designated for Persons with HIV/Aids	
# of Units Designated for Homeless Persons and Families	
Provide the following information with regard to all funding SOURC	CES used to date for this project:

Provide the following information with regard to all funding SOURCES used to date for this project

Sources	Total Award	Spent this Quarter	Spent to Date	Balance Remaining

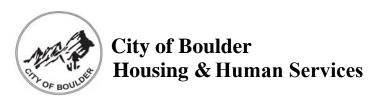


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2nd Quarter Progress Report

Part I. Project Information	
Grantee/Owner Name:	Project Name:
Staff Completing Report:	
Reporting Period: Apr 1 st – June 30 th Report Year:	_ Fund Year: Funding Amount:
Part II. Narrative (Describe project status, note progress satisfy	ing funding conditions)
Part III. Housing Projects with Covenants (Projects w	vith housing units only)
Total # of Units in Project	
Total # of Affordable Units in Project	
# of Affordable Units Currently Under Construction	
# of Affordable Units Completed	
# of Affordable Units Sold	
# of Units Qualified as Energy Star	
# of Units Section 504 Accessible	
# of Units Designated for Persons with HIV/Aids	
# of Units Designated for Homeless Persons and Families Provide the following information with regard to all funding SOURCE.	

Sources	Total Award	Spent this Quarter	Spent to Date	Balance Remaining



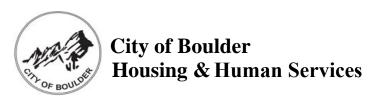
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3rd Quarter Progress Report

Part I. Project Information	
Grantee/Owner Name:	Project Name:
Staff Completing Report:	Phone:
Reporting Period: July 1 st – Sept 30 th Report Year:	Fund Year: Funding Amount:
Part II. Narrative (Describe project status, note progress sat	isfying funding conditions)
Part III. Housing Projects with Covenants (Project	ts with housing units only)
Total # of Units in Project	
Total # of Affordable Units in Project	
# of Affordable Units Currently Under Construction	
# of Affordable Units Completed	
# of Affordable Units Sold	
# of Units Qualified as Energy Star	
# of Units Section 504 Accessible	
# of Units Designated for Persons with HIV/Aids	
# of Units Designated for Homeless Persons and Familie	s
Provide the following information with regard to all funding SOUR	CES used to date for this project:

Provide the following information with regard to all funding SOURCES used to date for this project

Sources	Total Award	Spent this Quarter	Spent to Date	Balance Remaining



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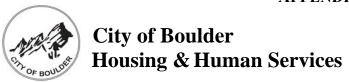
4th Quarter Progress Report

Part I. Project Information						
Grantee/Owner Name:	_ Project Name: _					
Staff Completing Report:	Phone:					
Reporting Period: Oct 1 st – Dec 31 st Report Year:	Fund Year:	Funding Amount:				
Part II. Narrative (Describe project status, note progress satisfying funding conditions)						
Part III. Housing Projects with Covenants (Project	s with housing units or	nly)				
Total # of Units in Project						
Total # of Affordable Units in Project						
# of Affordable Units Currently Under Construction						
# of Affordable Units Completed						
# of Affordable Units Sold						
# of Units Qualified as Energy Star						
# of Units Section 504 Accessible						
# of Units Designated for Persons with HIV/Aids						
# of Units Designated for Homeless Persons and Families	S					
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Provide the following information with regard to all funding SOURCES used to date for this project

Sources	Total Award	Spent this Quarter	Spent to Date	Balance Remaining

APPENDIX B



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2020 Annual Beneficiary Report

Grantee/Owner Name:	Project Name:	
Staff Completing Report:	Phone:	
Fund Year:	Funding Amount:	
Section I. Beneficiaries		
Total Households Served	_	
Total City of Boulder Households Served	-	
Total Female Head of Households Served	-	
Total Disabled Head of Households Served	-	
Total Senior Head of Households Served	-	
Section II. Housing Projects (Projects involving rehab, a	cquisition or new construction	on only)
Total # of Units at Start of Project	-	
Total # of Units Expected at Project Completion	<u>-</u>	
Total # of Units Completed	<u>-</u>	
Section III. Race & Ethnicity (Response must include be	oth race and ethnicity for CO	B households only)
Race	Hispanic/Latino	Not-Hispanic/Latino
American Indian/Alaska Native		
Asian		
Native Hawaiian/Other Pacific Islander		
Black/African American		
White		
Other (Multi-Race)		
Section IV. Household Income (Please report for COB	households only)	

Area Median Income	Total Number Served
Total # Extremely Low-Income Households (up to 30% AMI)	
Total # Very Low-Income Households (31% to 50% AMI)	
Total # Low-Income Households (51% to 68.8% AMI)	
Total # of Moderate Income Households (68.9% to 100%	
AMI) Total # of Households above (100% AMI)	

Please refer to the enclosed chart for information on Boulder AMI limits.

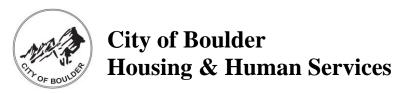
APPENDIX C



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2020 Annual Certification of Compliance

	Property Name:	Address:			
	Reporting Period:	January 1, 2019 to December 31, 2019			
S	ection I. Certific	ation			
cn ce	owledge and that he	by certifies that the information presented herein is te/she will, if requested, submit documentation in supprALTY OF PERJURY that the project meets the compliance Manual.	ort of such	statement.	He/she furthe
	Representative Nar	me: Title:			
	Email:	Phone:			
	Representative Sign	nature:			
		ntact information has changed since submittal of the la			
	Owner:	Title:			
		Phone:			
	Owner Signature: _				
	☐ Click here if contact information has changed since submittal of the last report.				
P	art II. Screening	& Selecting Applicants			
	Plan specific to procedures for re	Manager developed and maintained a Tenant Selection the property which describes the methods and eceiving applications and screening applicants for please provide an explanation below:	☐ Yes	□ No	□ NA
		nager certifies that all applicants were provided the omplete an application. If no, please provide an ow:	Yes	☐ No	□NA
	compliance with	Manager developed and maintained a waiting list in the requirements outlined in the Rental Compliance please provide an explanation below:	Yes	□ No	□NA



P	art III. Determination of Eligibility			
	a. Has the Owner/Manager made a proper determination of eligibility of all households upon initial occupancy and annually thereafter upon lease renewal?	Yes	□ No	□NA
	b. Has the Owner/Manager maintained adequate documentation in each tenant file which demonstrates eligibility?	Yes	☐ No	□NA
	c. Has the Owner/Manager completed third party verification of all sources of income and assets at initial occupancy and every sixth year of the placed in-service date?	Yes	□ No	□NA
	d. Has the Owner/Manager used tenant self-certification to document eligibility during intervening years?	Yes	□ No	□NA
P	art IV. General Compliance Requirements			
	a. Has the Owner/Manager refused to lease a permanently affordable unit to a Section 8 voucher holder or any household that receives a comparable rental housing assistance subsidy?	Yes	□ No	□NA
	 b. Has the Owner/Manager issued any residents with a Termination of Tenancy or Notice of Non-Renewal? If yes, provide an explanation on the Annual Vacancy Report 	Yes	☐ No	□NA
	c. Does the Owner/Manager maintain a capital reserve account for the property?	Yes	☐ No	□NA
	d. Does the current lease used by the Owner/Manager of permanently affordable units meet the requirements outlined in the Rental Compliance Manual?	Yes	☐ No	□NA
	e. The Owner/Manager certifies that all applicants and tenants were provided the opportunity to self-report their race and ethnicity which is documented in each tenant file.	Yes	□ No	□NA
	f. The Owner/Manager certifies that tenant paid rent does not exceed the maximum rent published annually by the City of Boulder.	Yes	☐ No	□NA
	g. Were any non-optional fees charged to tenants in addition to rent? If yes, please attach a list of type and amount of fees.	Yes	☐ No	□NA
	h. The Owner/Manager certifies that a Declaration of Citizenship has been completed by all members of the household occupying HOME-assisted units and maintained documentation in the tenant files.	Yes	□ No	□NA
	 The Owner/Manager certifies compliance with the city's Student Policy. 	Yes	☐ No	□NA
	j. The Owner/Manager compliance with the city's Income & Asset Policy.	Yes	☐ No	□NA
	k. For HOME properties, the Owner/Manager certifies compliance with all federal, state and local laws relating to fair housing and equal opportunity, including but not limited to the following:	Yes	☐ No	□NA
	 The Federal Fair Housing Act Age Discrimination Act of 1975 			



City of Boulder Housing & Human Services

- Section 504 of the Rehabilitation Act of 1973
- Americans with Disabilities Act of 1990
- Title VI Civil Rights Act of 1964

Part V. Property Standards	
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P	art	V. Property Standards			
	a.	During the reporting period, did the Owner/Manager conduct a physical inspection of each permanently affordable unit to ensure that the property continues to meet federal, state and local property standards?	Yes	☐ No	□NA
	b.	The Owner/Manager certifies that all units in the property were suitable for occupancy, taking into account local health, safety and building codes.	Yes	□ No	□NA
	c.	The Owner/Manager certifies compliance with Lead Based Paint regulations at 24 CFR Part 35 and requirements outlined in the Rental Compliance Manual?	Yes	□ No	□NA
		The Owner/Manager must incorporate ongoing lead-based paint maintenance activities into regular building operations. For HOME rental properties, these include:			
		 Regular maintenance and evaluation of the lead hazard reduction work must be performed. The Owner/Manager is responsible for: A visual inspection of lead-based paint annually and at unit turnover; Repair of all unstable paint; and 			
		 Repair of encapsulated or enclosed areas that are changed Owners/Manager should request, in writing, that the occupants of permanently affordable rental units monitor lead-based paint surfaces and inform the Owner/Manager of potential lead hazards. A copy of this request should be documented in the tenant file. 			
P	art	VI. Reporting Requirements			
	a.	Owner/Manager submitted all required reports to City of Boulder compliance staff in order to be considered active and in good standing.	Yes	☐ No	□NA
	b.	Owner/Manager submitted all reports in the format required by City of Boulder compliance staff.	Yes	☐ No	□NA
	c.	Owner/Manager submitted all reports within the timeline required by City of Boulder compliance staff.	Yes	☐ No	□NA
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APPENDIX D



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2021 Affirmative Marketing Compliance Report

P	Property Name:	Address:				
S	Staff Completing Report:	Phone:				
	# Units: # HOME Units: # Access	ible Units:				
Sec	ction I. Resident Data					
	Demographic Characteristics	Total Nu	mber of Re	sidents in 2	2021	
	Vhite					
	Black or African American					
	Asian					
	American Indian or Alaska Native					
	Native Hawaiian or Other Pacific Islander					
	Hispanic or Latino					
	Female Head of Household					
	Elderly/Senior Head of Household (55+)					
	Person with Disabilities					
F	Families with Children (under age 18)					
O	Other (specify):					
Par	rt II. General Compliance					
a.	Is there an Equal Opportunity Fair Housing Poster displayed in the rental office?	prominently	Yes	☐ No	□NA	
b.	b. Is the Fair Housing Logo displayed on all applicati and marketing materials?	ons, program	Yes	☐ No	□NA	
c.	c. Is there a copy of the Owner's Affirmative Fair Housing Marketing Plan (AFHMP) in the office or wherever prospective tenants may apply for rental housing?			□NA		
d.	d. Does the Owner/Property Manager regularly review the AFHMP (every five years or when there are significant changes in the demographics of the property or the local market area) to ensure it is current and applicable?					
e.	. What is the date of the last AFHMP update?					
f.	f. Does the Owner/Property Manager use the "Affirmative Marketing Yes No NA Outreach List" provided by the city to market the property?		□NA			
g.	g. Of the total number of accessible units in the property, how many are occupied by persons with disabilities?					

P	art	III. Tenant Selection Plan				
	a.	Does the Owner/Manager have an approved Tenant Selection Plan on site for applicant and tenant review?	Yes	☐ No	□NA	
	b.	Does the project's Tenant Selection Plan include procedures for taking applications, selecting from the waiting list, and policy for opening, closing and maintaining the waiting list?	Yes	□ No	□NA	
	c.	Does the Tenant Selection Plan include policies for Fair Housing, Section 504, and assigning accessible units?	Yes	☐ No	□NA	
	d.	Does the Tenant Selection Plan include policies for preferences?	Yes	☐ No	NA	
P	art	IV. Property Management Staff Training				
	a.	Has the Owner/Property Manager provided training to property management staff regarding fair housing laws and the Affirmative Fair Housing Marketing Plan?	Yes	☐ No	□NA	
	b.	How often does the Owner/Property Manager provide training to property management staff regarding fair housing laws and the Affirmative Fair Housing Marketing Plan?				
P	art	V. Record-Keeping & Reporting				_
	a.	Does the Owner/Property Manager maintain a record of Fair Housing Complaints?	Yes	☐ No	□NA	
	b.	Does the Owner/Property Manager collect and maintain data on race, ethnicity, gender, age, and disability for applicants?	Yes	☐ No	□NA	
D	c.	Does the Owner/Property Manager collect race and ethnicity data from applicants and residents?	Yes	□ No	□NA	
P	art	VI. Owner/Property Manager's Demographic Analysis				
	a.	Does any of the demographic data show a low representation of any protected groups in either the properties applicants or residents?	Yes	☐ No	□NA	
	b.	What reasons have you identified for these low numbers? (if applicable	·)			
	c.	What actions have been taken to correct the reasons for the low number of action taken. (if applicable)	rs? Please p	orovide doc	cumentation	
	d.	Has the Owner/Property Manager set-up and maintained records to reflect any studies or action taken?	Yes	□ No	□NA	

APPENDIX E

Annual Tennant Report Process Manual

For the 2019 reporting period, the City of Boulder's Housing department is implementing a new standardized data collection tool to collect tenant information for individuals who live in affordable housing.

Tenant data will now be collected through a validated google form. Each property manager will receive a unique form that they will input their data into. The unique forms will include prepopulated data such as property name, unit numbers, unit square footage, and # bedrooms to reduce the data collection burden and increase data quality.

The following steps will document how to fill out the form as well as provide column definitions.

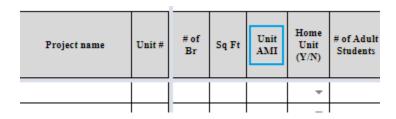
1. You will receive a unique google link to a form that collects annual tenant data.



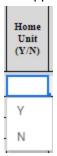
2. Only add in data for tenant who are currently living in the affordable housing unit.

Unit Information

1. Once you have the form open start by filling out the "Unit AMI" column. Property name, Unit #, # of Br, and Sq Ft will already be automatically populated.



2. The next column requires the property manager to determine if it is a HOME unit. A dropdown menu will appear when the arrow is clicked providing the following choices Y- Yes or N-No.



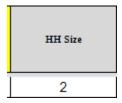
Tenant Demographic Information

This section will capture information on tenant demographics and household assets.

1. Designate how many adult students live in the unit. If a number greater than 0 has been entered into the "# of Adult Students" column the subsequent column "Student Exception" will require an input

# of Adult Students	Student Exemption (Y/N)	
2	1. Yes	*
0	3. Not applicable	*

- 2. Proceed to enter the name of the household in the "HOH Name" column
- 3. The next 6 columns require standardized entries that have been predefined by the city. Click on the arrow in the cell to see what possible options can be entered. Once the option has been identified, click on it so it populates in the cell.
- 4. Please review appendix 1 for all categories and definitions.
- 5. The next column is "HH size". Please enter the size of the household.



Tenant Income/Asset Information

This section will capture information about the income and assets of the tenant.

- 1. Enter the household annual income in the "Annual HH Income" Field
- 2. Enter all assets of the household.

Please note that Asset are now broken down into 4 columns:



Asset Amount:	Asset Amount:	Asset Amount:	Asset Amount:
Cash, Checking, Savings,	Pension, 401K,	Other Liquid Assets	Other Non-Liquid
Money Market	Retirement Fund	(Stocks/Bonds)	Assets

3. Document in the "Residential Real Estate Asset" if the tenant owns residential property. There are two options to choose, either yes or no.

Tenant Rent Paid/Occupancy

This section captures information on the amount of rent paid, subsidies received and the date of initial occupancy.

1. Please enter amount that are specific to each column. A sum of total will automatically calculate.

Tenant Paid Rent	Rental Subsidy	Utilities	NonOptional Charges (Amenities)	Total
\$800.00	\$100.00	\$50.00	\$10.00	\$960.00

2. Enter the date that the tenant initially occupied the unit in the following format "mm/dd/yy"

Additional Guidance

The form incudes validated fields which means that if information is entered incorrectly it will throw an error. Errors can be identified by a red mark in the top right corner of the cell that is presenting an issue. Once the form is complete, please notify your city of Boulder compliance manager.

Appendix 1

Demographic columns:

Column Name	Categories (definitions)
НОН Туре:	Single Married
	Single Parent Male
	Single Parent Female
HOH is Disabled:	Yes
	No
HOH: Is Senior/Elderly (62+):	Yes
	No
Race:	American Indian or Alaska Native
	Asian
	Black or African American
	Native Hawaiian/ Other Pacific Islander
	White
	Refused
Ethnicity:	Hispanic
	Non-Hispanic
	Refused
HOH Occupation :	Service (waiter, cook, customer service etc.)
	Management (administrator, manager etc.)
	Technical/Trade (construction, technician, driver, etc.)
	Self-employed (owns own business etc.)
	Unemployed (no current job)
	Retired (not working due to being retired)
	Other
	Disabled
	Professional (sales, legal assistant, engineer, analyst etc.)
	Education (teacher, professor, etc.)
	i Luucation (teacher, brolessor, etc.)



City of Boulder **Housing & Human Services**

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Student Exemption Type:	

1. 24+ years old 2. U.S. Military veteran

4. Dependent child(ren)

5. Living with an eligible parent

3. Disabilities

Head of Household Type: 7. Receives TANF assistance

8. Enrolled in job training (e.g. WIA) 9. Previously in Foster Care 10. Student(s) with multiple exemptions

1. Single 2. Married

2. Asian 3. Single Parent Male 3. Black or African American 4. Single Parent Female 4. Native Hawaiian/ Other Pacific Islander

Race:

5: White

1. American Indian or Alaska Native

Ethnicity: HOH Occupation: 1. Hispanic

3. Refused

1. Service 2. Not-Hispanic 2. Management 3. Technical/Trade

5. Unemployed

9. Professional 4. Self-Employed 10. Education 11. Medical

7. Other

8. Disabled

IMPORTANT NOTE: Sections highlighted in yellow below provide a drop-down menu for responses to each section.

6. Married	i chighole j	parent							6. Refused						6. Retired		11. Wiedicai											
o. Married									o. Refused						o. Retired													
Property Name	Unit#	# of Br	Sq Ft	Unit AMI	Home Unit	# of Adult Students	Stdent Exemption	Student Exemption Type	НОН Name	НОН: Туре	HOH: Disabled	HOH: Elderly (55+)	Race	Ethnicity	HOH Occupation	HH Size	Annual HH Income	Asset Amount: Cash, Checking, Savings, Money Market	Asset Amount: Pension, 401K, Retirement Fund	Asset Amount: Other Liquid Assets (Stocks/Bonds)	Asset Amount: Other Non- Liquid Assets	Residential Real Estate Asset?	Tenant Paid Rent	Rental Subsidy	Utilities	NonOptional Charges	Total	Date of Initial Occupancy (M/D/Y)
																												
																												
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APPENDIX F



2021 Annual Vacancy Report

Owner/Grantee Name:		Date:
Race:	Ethnicity:	
A. American Indian or Alaska Native	A. Hispanic/Latino	
B. Asian	B. Not-Hispanic/Latino	
C. Black or African American		
D. Native Hawaiian/Other Pacific Islander		
E. White		
F. Other		

Important Note: All households that occupied a permanently affordable rental unit in 2021 but vacated the unit prior to December 2021 must be included in this report. All households that continue to occupy their unit through the end of the year should be included in the Annual Tenant Report. All households that received a formal notice of Termination of Tenancy/Eviction or a Notice of Non-Renewal must include the type notice issued and a reason for Termination of Tenancy/Eviction or a Notice of Non-Renewal.

Property Name	Unit #	HOH Name	Race	Ethnicity	Date of Initial Occupancy	Date of Move- Out	Reason for Leaving

