Announcing South Coast Air Quality Management District's
Electric School Bus Funding Program

Program Announcement & Application
PA2017-01

December 2, 2016

Depending upon the number of applications received and availability of funding, the SCAQMD Board retains discretion to make full awards, partial awards or no awards at all under this Program Announcement. If the choice to make a partial award causes any bidder to withdraw, the funds that would have been awarded to that bidder will be re-allocated to the other bidders or allocated pursuant to a new program announcement. SCAQMD also reserves the right to change any criteria such as the schedule, qualifications, grant provisions and selection criteria outlined in this Program Announcement & Application.

December 2, 2016

As part of the ongoing "Lower-Emission School Bus Program (LESB)", the South Coast Air Quality Management District (SCAQMD) is pleased to announce a funding opportunity for purchasing new Type C or Type D electric school buses in the South Coast Air Basin. These buses have to be pre-approved by the state air pollution agency, the California Air Resources Board, "CARB" or "ARB". Only public school districts, and those participating under a joint powers authority agreement (JPA), are eligible for these funds.

To assist in commercializing zero emission school buses (ZEBs), and in contrast to previous funding programs, SCAQMD does not require eligible applicants to replace an older school bus while purchasing a new electric school bus. However, **after** being approved for award by the SCAQMD Board on May 5, 2017, applicants will be required to apply to CARB for Hybrid and Zero Emission Truck and Bus Voucher Incentive Project (HVIP) funds to be eligible for participation in SCAQMD's program.

Background

Since 2001, when the Lower-Emission School Bus (LESB) Program began, SCAQMD has awarded nearly $280 million in state and local funds to: replace 1,600 highly polluting older diesel school buses with clean alternative fuel, primarily CNG, buses and retrofit 3,400 more diesel school buses with PM traps. As a result of the LESB Program, thousands of school children travel in some of the cleanest and safest buses in the country.

As described later in the Program Announcement, awards for this new School Bus Program will be provided from the Carl Moyer Program AB 923 funds and CARB's HVIP funds. Again, in contrast to previous funding programs, minimal to zero matching funds will be required of school districts to purchase these electric buses. Additional funds, up to $20,000 per electric school bus awarded, will be provided to cover electric infrastructure for charging these buses.

The application deadline for Program Announcement PA2017-01 is 4:00 p.m. February 10, 2017.

The final funding awards will be subject to SCAQMD Board approval. Depending on the number of requests received, all requests may not be funded in their entirety.

Highlights of the School Bus Replacement Program

Eligibility

Only public school districts and joint power authorities (JPAs) in the South Coast Air Basin are eligible to apply.

Funding – CARB and SCAQMD.

Funding for the purchase of CARB-approved electric school buses are provided by SCAQMD's AB 923 funds, and the HVIP program administered by CARB ("HVIP Incentive Voucher"). **After** being approved for AB 923 awards by the SCAQMD Board on May 5, 2017, school districts and eligible JPAs must apply for funding, through their vendors, to CARB program to reserve/obtain this HVIP Incentive Voucher. If school districts are not awarded HVIP funds, they will not be eligible for participation in SCAQMD's program and a contract will not be executed. d.

The HVIP Web link is at:

http://www.californiahvip.org/

After the school district receives the HVIP incentive for each bus, the SCAQMD will fund the remaining part of the base price of the electric school bus, inclusive of sales tax. (School districts will have to pay for any additional discretionary options that they may choose to include on the bus). Applying for HVIP funds **after** SCAQMD Board approval is mandatory if school districts want to qualify for SCAQMD funds.

SCAQMD Awards will include up to $20,000 per electric bus for installing electric school bus recharging infrastructure.

Schools need to include the latest CARB Executive Order (1 page) for the electric school bus being ordered. Buses must have a GVWR of 14,000 lbs. or above and must be either Type C or D. CARB-approved Type C or D electric school buses are listed at the following link

http://www.californiahvip.org/docs/HVIP_Year4_EligibleVehicles.pdf

Minimum length of service: Schools need to operate these new school buses for a minimum of 6,000 miles annually for 7 years from the date of CHP certification. Failure to do so may cause the reporting period to be extended until the operational target has been reached or the SCAQMD may seek other proper remedies.

Application – original & 3 hard copies with Superintendent's signature and digitized version

The original plus three copies of the application must be received by SCAQMD no later than 4:00 p.m. Friday, February 10, 2017. (Applications will be rejected if not received by 4:00 p.m. sharp that day).

Also applicants must submit to SCAQMD's School Bus Program Supervisor the following:

a) two Excel sheets with details of the school buses in the fleet - one hard copy that accompanies the application, and the other sent electronically to Ranji George at rgeorge@aqmd.gov
b) a digitized version of the whole application

Please see below for further details of the Program, procedures to apply and the application forms.

Should you have any questions regarding this Program Announcement, please contact:

- Ranji S. George, Program Supervisor, at (909) 396-3255
  Email: rgeorge@aqmd.gov.
- Or Ms. Lily Garcia, at (909) 396-2832, lgarcia1@aqmd.gov
- Please note: SCAQMD is closed on Mondays.

The Program Announcement and Application PA2017-01 can also be accessed via the Internet by visiting SCAQMD's website at **www.aqmd.gov/grants-bids**.

Our main objective is to reduce children's exposure to harmful emissions from diesel school buses. We look forward to receiving your application.

ATTACHMENTS

Application Form and Procedures to Apply for Funding to Purchase New Electric School Bus

CERTIFICATIONS AND REPRESENTATIONS:

- All Applicants need to provide updated Business Contact Information
- New Applicants need to fill in the Taxpayer ID information

Funding for New Electric School Buses

(Only Public School Districts and Joint Power Authorities are eligible to apply)

PA2017-01

December 2, 2016

SCAQMD's Electric School Bus Funding Program

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I.A. PROGRAM INTRODUCTION

In earlier rounds of funding, SCAQMD has provided about $280 million in funding and replaced over 1,600 older diesel buses with new alternative fuel bus, primarily CNG, and has retrofitted nearly 3,400 more diesel buses with PM traps. Over 50 percent of these funds have been awarded to school districts located in disproportionately impacted areas. Thousands of students travel daily in these SCAQMD-funded school buses that are among the cleanest and safest in the country.

Funding Available for Electric School Buses

Background

Under this Program Announcement, SCAQMD will be providing its AB 923 funds for the purchase of new CARB-approved Type C or D electric school buses with a gross vehicle weight, GVWR, of over 14,000 lbs. Only public school districts and joint power authorities are eligible to apply under this program.

Public school districts are required to apply to CARB's HVIP Program **after** SCAQMD Board approval of awards on May 5, 2017. If awarded HVIP funds, SCAQMD will fund the remaining balance of the base price of the bus in addition to sales tax. If school districts do not apply and are not awarded HVIP funds, they will become ineligible for SCAQMD's program and a contract will not be executed. If HVIP funds are awarded, SCAQMD's program will fund the remaining amount of the full purchase price including sales tax of the electric school bus(es), School districts will have to pay for any additional discretionary options that they may choose to include on the bus.

In addition, up to $20,000 per electric school bus will be provided for electric charging infrastructure.

I.B. PROGRAM SCHEDULE

The implementation schedule is outlined below.
Tentative Schedule for Electric School Bus Purchase Program

December 2, 2016 (Friday)	Issue Program Announcement & Application PA2017-01.
February 10, 2017 (Friday)	**Applications are due by 4:00 p.m**. Applicants are encouraged to apply well before this deadline.
May 5, 2017 (Friday)	SCAQMD Board to consider approval of staff's proposal on Electric School Bus awards.
July 18, 2017	All school bus purchase orders must be placed with vendors by school districts. Copies of vendor quotes and purchase orders

should be scanned and emailed or faxed to SCAQMD (attn. Ms. Lily Garcia, Fax: (909)396-3252).

March 30, 2018 New electric buses delivered and electric infrastructure completed.

I.C. APPLICATION SUBMITTAL

The applicant shall submit **four copies** (1 original and 3 copies) of the application, each marked **"Program Application PA2017-01".** These four copies should be placed together in a sealed envelope, plainly marked in the upper left-hand corner with the name and address of the applicant, **no later than 4:00 p.m., Friday, February 10, 2017**.

The application package must be addressed to:

Mr. Dean D. Hughbanks, Procurement Manager
Re: Program Application PA2017-01
Electric School Bus Purchase Program
South Coast Air Quality Management District
21865 Copley Drive
Diamond Bar, CA 91765

Applications must be **signed by the school's superintendent**. (School superintendents shall not delegate this responsibility for signature to his or her deputy.). In addition, a digitized copy of the entire application and Excel sheet of fleet inventory should be emailed to the school bus program supervisor at rgeorge@aqmd.gov.

I.D. PARTICIPATION GUIDELINES, REQUIREMENTS, & CONDITIONS

Grant Provisions for the Electric School Bus Program

A. Electric School Bus Program Overview

- Only public school districts within the jurisdiction of the SCAQMD that own and operate school buses, including under provisions of a joint powers authority, can apply for funding.

- The new electric school bus must have a manufacturer gross vehicular weight rating (GVWR) of greater than 14,000 pounds and be either Type C or Type D (CARB classification).

- To receive SCAQMD funding, the new electric school bus must be on the CARB approved list and also be CHP certified prior to operation. A copy of this CHP certificate must be included in the invoice.

1. The school district can apply for electric charging infrastructure funds. If awarded, school districts are eligible for up $20,000 per electric school bus. Funds will be disbursed after the electric charging infrastructure is installed and has begun operating.

2. The application form calls for specific information related to the new electric school bus. Additional information may be required on the bus purchased.

3. Applicants must provide complete documents pertaining to the new bus purchase, and infrastructure, including vendor quotes, vendor invoices, detailed listing of the infrastructure equipment, etc.

4. Additionally, these documents must be stored for a period of fifteen (15 years) after the date of delivery of the new bus(es). Access to these files, and personnel involved in the transactions, should be allowed in the event of an audit from either state or local authorities. After the first 7 years, files can be stored in digital form.

5. School districts need to include the latest CARB Executive Order (1 page) for the new electric bus being ordered.

6. With the application, applicants must include a print-out of the current school bus fleet inventory. Additionally, an electronic version of the fleet composition (preferably in Excel) should be sent directly to the Ranji George at rgeorge@aqmd.gov.

B. Electric School Bus Infrastructure Criteria Overview

1. If funds for electric charging infrastructure are required, the applicant must make such request, and provide justification for the equipment requested. Applicant must seek at least 3 different quotes for the equipment purchase and installation, including warranties.

2. New infrastructure capacity requested will be directly related to the capacity needed by the new electric school buses awarded through this Program.

3. Electric charging infrastructure must meet all applicable local, state, federal and industrial codes.

4. The electric charging infrastructure must be installed by licensed electrician(s) with strong proven background in installing such infrastructure. Before hiring, school districts must provide evidence of the installer's experience (in installing electric recharging infrastructure for heavy-duty vehicles).

5. Requested infrastructure funds is strictly limited to offset the cost of procuring and installing new recharging equipment or expanding the capacity of an existing recharging station.

C. ***State Law on Prevailing Wages***

Recipient, Contractor and subcontractors are bound by the **prevailing wage requirements** of California Labor Code section 1770 et seq (see below):

SB 854 provisions on Prevailing Wages

State legislation SB 854 (http://www.dir.ca.gov/Public-Works/SB854.html) requires all recipients or contractors, before they can accept funds from a public agency, to register with the Department of Industrial Relations (DIR). SCAQMD grant provisions will be amended to include the following:

PREVAILING WAGES – GRANTEE is alerted to the prevailing wage requirements of California Labor Code section 1770 et seq., and the compliance monitoring and enforcement of such requirements by the Department of Industrial Relations ("DIR"). GRANTEE and all of GRANTEE's subcontractors must comply with the California Public Works Contractor Registration Program and must be registered with the DIR to participate in public works projects.

GRANTEE shall be responsible for determining the applicability of the provisions of California Labor Code and complying with the same, including, without limitation, obtaining from the Director of the Department of Industrial Relations the general prevailing rate of per diem wages and the general prevailing rate for holiday and overtime work, making the same available to any interested party upon request, paying any applicable prevailing rates, posting copies thereof at the job site and flowing all applicable prevailing wage rate requirements to its subcontractors. Proof of compliance with these requirements must be provided to SCAQMD upon request. GRANTEE shall indemnify, defend and hold harmless the South Coast Air Quality Management District against any and all claims, demands, damages, defense costs or liabilities based on failure to adhere to the above referenced statutes.

For additional Prevailing Wage requirements, applicants are encouraged to visit the DIR website: www.dir.ca.gov/PublicWorks/PublicWorks.html

FUNDING ALLOCATIONS

A. Amounts of SCAQMD Funding and HVIP incentives

1. Under its HVIP Program, CARB is making incentives available to assist with the purchase of the electric school buses. Applicants must apply, through the preferred bus vendor, to CARB to acquire this HVIP funding. The following link provides more information on these incentives

   http://www.californiahvip.org

2. Eligible Type C or D electric school buses are listed at the following link

   http://www.californiahvip.org/docs/HVIP_Year4_EligibleVehicles.pdf

3. SCAQMD will coordinate its efforts with CARB and in case of school districts being awarded HVIP funds, SCAQMD will first deduct the HVIP voucher amount, and then pay the remaining balance of the retail price of the school bus, including sales tax as agreed upon by the SCAQMD with the bus vendor. SCAQMD's AB 923 funds will be the source of these funds. If the school district does not apply and is not awarded HVIP funds **after** SCAQMD Board approval, they will not be eligible for participation in SCAQMD's program and a contract will not be executed.

4. The basis for the amount of funding requested for the purchase of electric school bus infrastructure shall be documented in the application. Equipment purchased, the reasons for buying the specific equipment, warranties, installation costs should be identified. Infrastructure awards shall not exceed $20,000 per new electric school bus awarded. These amounts will also be paid through AB 923 funds.

B. School Matching Fund Requirement - special options

1. No matching funds are required for the purchase of base electric school bus. SCAQMD intends to pay, after deducting CARB's HVIP incentives, the full retail price of the electric school bus in the amounts mutually agreed upon between SCAQMD and the electric school bus manufacturer.

2. School districts need only to pay for the special options ordered by the school district that are not included in the base electric bus cost. These special options (e.g., upgraded air conditioning, lift chair, retarders, etc.) must be listed in the application and the final invoice package.

C. Authorizing Signature –Superintendent

For the application and any subsequent Grant issued by the SCAQMD, the school district's superintendent must sign. Applications without Superintendent authorizing signatures will not be accepted. The superintendent cannot delegate his or her signature responsibility to his deputy or associate. If there is an acting or interim superintendent, supporting documents approved by the School Board must be included verifying the acting or interim capacity.

School district must submit the signed school bus application, and 3 copies, on or before the deadline of February 10, 2017, 4:00 p.m. (Any application received after 4:00 p.m. sharp that day will be rejected.)

D. Disbursement of Funds – steps involved

1. Following application submittal, SCAQMD staff will evaluate the applications from the applying school districts. Staff will then propose awards to its Board based on eligibility criteria and funding availability. This process is estimated to take about 3 months.

2. SCAQMD Board has the final right to accept, reject, modify in whole or part, staff's proposal. The Board also reserves the right to add or delete, in whole or in part, the funding recommended.

3. Subsequent to Board approval, staff will notify school districts of the Board's decision and will begin generating grants for individual school districts, contingent upon an HVIP award. Given the volume of applications submitted and buses to be evaluated, this process may take up to 90 days.

4. Once SCAQMD issues the Grant, the school district's Superintendent must initial and sign both originals of the Grant documents. After the Superintendent's signature, both signed originals of the Grant are to be sent back to SCAQMD. Following the full execution of the Grant, one of the fully executed originals will be sent back to the school district.

5. The school district must provide <u>a copy</u> of the fully executed grant agreement and key attachments to the selected school bus vendor. Per the grant, without delay, a purchase order needs to be drafted for SCAQMD's review. After SCAQMD review and approval, this purchase order shall be issued promptly to the vendor. (SCAQMD's review of the draft purchase order will be limited to determining if the purchase order complies with SCAQMD's grant provisions).

6. The school district must then apply through its preferred bus vendor to obtain and reserve incentives from HVIP funds administered by CARB (see link above).

7. All electric school buses must be physically delivered to the school district by **March 30, 2018.**

8. Following the delivery of the new electric school bus(es) to the applicant, the vendor must collect all the necessary documents for a final invoice package to SCAQMD. School districts must fully cooperate with the vendor to provide these documents.

9. To receive reimbursement, a proof of vehicle delivery should be signed by the Director of Transportation. A copy of the CHP 292 certificate approving the use of the new bus, along with copies of the DMV title and DMV registration of the new bus(es), must be submitted through the bus supplier to SCAQMD. (The Grant will list the required documents needed for invoicing the SCAQMD.)

10. With regards to *electric infrastructure*, these funds will be paid on a reimbursement basis following completion of the electric recharging facility and submittal of the required

invoice and supporting documentation. The electric infrastructure must be completed and operational by **March 30, 2018**. Proof of completion shall accompany the invoice request for reimbursement.

11. Monies owed will be paid directly to the infrastructure installer. We strongly discourage the school district from paying the installer directly, but if it does, SCAQMD will require copies of the checks issued (both front and back) to the installer along-with the remainder of the documents listed in the Grant.

PROJECT IMPLEMENTATION

A. Project Completion Deadlines and Penalties – for New Buses and Infrastructure

1. School bus purchase orders must be placed no later than July 18, 2017.

2. New buses must be delivered no later than **March 30, 2018**. The business entity responsible for delaying the delivery of the buses may be subject to $100 per day per bus penalty for buses delivered after March 30, 2018. This statement shall be included in purchase orders.

3. All electric charging infrastructure must be installed and begin operating by **March 30, 2018**.

B. Monitoring, Invoicing and Reporting

1. School districts must notify SCAQMD when the funded buses are ordered and again when the buses arrive on site. Prior to reimbursement, an inspection by SCAQMD may be required.

2. CHP 292 certificate(s) approving the new electric bus(es) is mandatory. A copy of the CHP 292 certificate should be included in the invoicing documentation required by SCAQMD. The Grant will list the documents required.

3. School districts must notify the SCAQMD's program supervisor by email to rgeorge@aqmd.gov when any equipment is ordered for the charging station and when the equipment is operating. (Prior to, or following reimbursement, an inspection by SCAQMD may be required.)

4. **Annual Reporting**: School districts must provide annual reports on the first week of January of each year. The reports must list the accumulated mileage of each electric school and include a copy of the annual CHP292 certification. Electric school buses should run at least 6,000 miles annually for 7 years. Failure to do so may cause the reporting period to be extended until the operational target has been reached or the SCAQMD may seek other proper remedies.

5. School districts are encouraged to report to SCAQMD any major repair (exceeding $2,000 annually) on a bus, and also provide a review of their experience with electric school buses. These reviews will help manufacturers to improve the product for future funding cycles.

I.E. IF YOU NEED HELP

This Program Announcement and Application can be obtained by accessing the SCAQMD website at www.aqmd.gov/grants-bids.

The following SCAQMD staff are available to answer questions about the application and the Grant:

Mr. Ranji S. George, Program Supervisor
Technology Advancement Office
Phone: (909)396-3255, Fax: (909)396-3252
rgeorge@aqmd.gov

Ms. Lily Garcia, Office Assistant
Technology Advancement Office
Phone: (909)396-2832, Fax: (909)396-3252
lgarcia1@aqmd.gov

- Alternative Contact

Ms. Drue Hargis, Senior Public Information Specialist
Technology Advancement Office
Phone: (909)396-3237, Fax: (909)396-3774
dhargis@aqmd.gov

Please note: SCAQMD is closed on Mondays

Appendix A

SCAQMD Electric School Bus Purchase Program

APPLICATION FOR GRANT TO PURCHASE ZERO- EMISSION ELECTRIC SCHOOL BUSES AND CHARGING INFRASTRUCTURE

Fiscal Year 2017-2018

PA2017-01

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GRANT APPLICATION FORM FOR THE
ELECTRIC SCHOOL BUS PURCHASE PROGRAM
Program Announcement PA2017-01
(Please return signed application with next 4 pages filled out)

School District: _____

Street Address:_____

City: _____ County:_____ State: CA. Zip Code: _____

School District Primary Contact Person:_____

Name/Title:_____

Phone No.: _____ Ext:_____ Fax: No.:_____

Email (please print): _____

Alternative Contact (name, title, phone, email address – please print)
_____

# of Electric School Buses Requested_____

CARB (state) HVIP funds requested (per electric bus)_____ Total HVIP_____

SCAQMD Funds Amount Requested (after state HVIP funds)_____

School Funds for Special Options (per Bus): _____

Total School funds for Options_____

An authorizing resolution from the school board approving this application must be attached. If the resolution is not available at the time of the application submission, it should be sent to the program supervisor within 2 months the application submittal.

Electric Charging Infrastructure Funds Requested (per Bus): _____

Total Infrastructure Requested_____

Superintendent's Signature (not to be delegated) _____

Name of School Supt. (please print):_____ Date Signed _____

Please attach business cards of Superintendent, primary and alternative contact persons. Also attach any notes or feedback applicant wants to provide to SCAQMD.

INFORMATION ON NEW ELECTRIC SCHOOL BUSES TO BE PURCHASED

- Must be CARB approved, GVWR above 14,000 lbs., and must be a Type C or Type D school bus
- Requested bus must be listed on CARB HVIP link:
  - http://www.californiahvip.org/docs/HVIP_Year4_EligibleVehicles.pdf
- For each bus make, please include ARB approval/certification for that bus

Bus Manufacturer /Supplier *	**Make, Model, and year of bus**	**Company who packaged the electric drivetrain**	**GVWR (must be at least 14,000 lbs.)**	**Promised Range of electric school bus with on a full charge**	**Warranties on the batteries**	**Warranties on electric drive train**	**Eligible CARB HVIP amount for bus**	**Total retail price (including sales tax)****

* Please include the full contact details of the manufacturer and distributor of the electric school bus(es) being purchased. Please attach business cards of primary contacts at manufacturer and distributor

** Please list retail price for the base electric school bus (i.e. without special options such as upgraded A/C, lift chair etc.).

Information on Diesel and CNG school buses:

- How many diesel pre-1994 buses left in your fleet (GVWR over 14,000 lbs.)?_____
- Total number of 1994 and newer diesel buses in the fleet_____
  - # of buses with Level 3 PM traps (1994 and newer)_____
  - # of buses without Level 3 PM traps (1994 and newer)_____
- Total number of CNG/propane buses in the fleet_____
- Do you have CNG/propane refueling site at your facility? _____Yes/No
- Approximate price being paid for CNG refueling: $/gge: Propane: $/gge:

Fleet Inventory:

- Please provide details of each school bus that remain in School District fleet in an Excel worksheet. Please include details of each bus (make, model, manufacturer, passenger capacity, engine make, model, year, fuel type, VIN#, license plate, accumulate mileage).
- For 1994 and newer models, please identify which diesel buses have Level 3 PM traps and which do not.
- Please print this Excel worksheet and attach to application, and send an electronic version to Ranji George at rgeorge@aqmd.gov.

Also, with regards to the new electric school buses, please identify any discretionary options being purchased by the school district, and their additional prices (inclusive of sales tax):

_____

_____

_____

_____

_____

ELECTRIC CHARGING INFRASTRUCTURE GRANT APPLICATION (PA2017-01)

Please answer all questions below. (If non-applicable, write N/A.)

Number of new Electric School buses applied for: _____

Amount of funds requested: _____

Local Electric Utility Company: LADWP or Edison or local utility (please name it)

_____

Please get three quotes to install the electric charging infrastructure (minimum 208 to 220 volts), and attach copies of the quotes, and estimated time required to complete the installation. In each quote, please ensure what equipment is installed and labor charges. (Note: to install the new recharging equipment, it is not necessary to move your CNG buses or CNG refueling.)

Electrical infrastructure quotes included with this application: Yes/ No.

Estimated infrastructure cost per bus_____

Please answer the following on the electrical charging infrastructure:

a) Before selecting the vendor, did school district staff make site visit(s) of the installing vendor's previous installations, and check vendor references?
b) Will bollards be installed to protect the chargers from being accidentally damaged?
c) Will remote monitoring of state of on-board battery charge on the bus be included?
d) Will remote monitoring of the external charging system be included?
e) Please identify the make, model and capacity and cost of the chargers.
f) Did the vendor describe the safety features of the charging system?
g) What warranties, if any, were offered with the charging system?

Additional comments (if necessary, please attach additional pages):

_____

_____

South Coast
Air Quality Management District

SAMPLE GRANT FOR NEW BUS AWARD (not to be returned with application)

Sample Provisions. SCAQMD reserves the right to amend these provisions.

GRANT AWARD & AUTHORIZATION FORM
New Electric School Bus Replacement Funding Program
Pursuant to Program Announcement PA2017-01

1. Your grant application to purchase new electric school buses has been approved for funding by the South Coast Air Quality Management District ("SCAQMD") Governing Board. The term "electric school bus" includes school buses powered by batteries only or by hydrogen fuel cells or a combination of both. The new electric school bus must be either a Type C or D and must be pre-approved by California Air Resources Board ("CARB"). The bus must comply with all relevant federal and state regulations.

A summary of the grant provisions are listed below:

GRANTEE	
Grant Number	
Number of Electric School Buses Awarded	*YY*
Required School Match for Above Buses	*Zero*
a. Total School Bus Replacement Grant Award	*YY*
b. Total Infrastructure Grant Award	*$20,000*
Maximum SCAQMD Award (a+b)	
Source of Funding	*Fund 80/AB 923*
Deadline for Physical Delivery of All Buses	**Not later than March 30, 2018**
Deadline for the Installation of the Electric Charging Station	**Not later than March 30, 2018**
Agreement Term with SCAQMD	**March 30, 2027**
Date to which School District must own and operate the new bus received under this Program	**At minimum, to March 30, 2025**
Date to Which All Records (relating to this Grant) Need to be Retained	**March 30, 2034**

2. PARTIES - The parties to this Grant Award Agreement ("Agreement") are the South Coast Air Quality Management District ("SCAQMD") whose address is 21865 Copley Drive, Diamond Bar, California 91765-4178, and School District ("GRANTEE") whose address _____

3. AGREEMENT TERM – The term of this Agreement is from the date of execution by both parties through **March 30, 2027**, unless further extended by amendment of this Agreement in writing. No work shall commence until this Agreement is fully executed by all parties. Inclusive of the Agreement term, there are two timeframes: A) **Project Completion**, which is from the date of grant execution to the date the last new school bus has been ordered, delivered and placed into operation; and B) **Project Implementation**, which is from the date the final invoice has been paid until the end date of this Agreement.

4. ADDITIONAL TERMS –To receive funds pursuant to this Grant, GRANTEE must comply with all of the following terms and conditions including those set forth in the following documents, which are attached and incorporated as part of this Grant.
   a. Information on the Electric School bus(es) to be purchased **(Attachment A-1)**;
   b. SCAQMD's Electric School Bus Funding Program Announcement and Application **PA2017-01** dated December 2, 2016 (Attachment D);

   In addition to the terms and conditions in this Grant, if a document was required as part of the application as specified by the Program Announcement, and has not yet been provided by GRANTEE to the SCAQMD, GRANTEE must provide such document(s) prior to grant execution.

5. PROVIDE VENDOR COPY OF GRANT - Copies of this Agreement must be provided to the vendor(s) selected to provide new electric school bus(es) and to vendor(s) that will install the electric charging infrastructure. This will, among other elements, enable the vendor to assist GRANTEE in complying with the terms and conditions of this Grant.

6. VENDOR TO DIRECTLY BILL SCAQMD - SCAQMD prefers that each vendor bill SCAQMD directly for electric school bus(es) delivered and electric charging station installed. GRANTEE is discouraged from paying the vendor directly, but if it does the GRANTEE must submit copies of the front and back of all cancelled check(s) paid to vendor along with all the required documentation listed in Clause 11 below (for buses) and/or Clause 16 (for electric charging infrastructure).

7. PROJECT MILESTONES – GRANTEE must achieve the following milestones under this Agreement:
   a. Issue purchase order (PO) to purchase new electric school bus(es) by **July 18, 2017**;
   b. Have all new buses delivered by vendor to GRANTEE no later than **March 30, 2018**;
   c. Ensure that the electric school buses being purchased are new, Type C or D, and are ARB certified.
   d. School districts apply and receive/reserve the CARB's HVIP incentives for each electric school bus ordered
   e. For reimbursement for new buses, vendor to submit invoice, along with required documentation from GRANTEE, to SCAQMD no later than **May 15, 2018** (see Clause 11 below for required documents to accompany new school bus invoice);
   f. Install Electric Charging Station(s) no later than **March 30, 2018**;
   g. For reimbursement for alternative fuel infrastructure, vendor to submit invoice along with required documentation to SCAQMD no later than **May 15, 2018** (see Clause 16 below for required documents to accompany infrastructure invoice);

8. PURCHASE ORDER & PENALTIES - GRANTEE must place purchase orders for the new bus(es) no later than **July 18, 2017.** Prior to its issuance, a copy of the purchase order from GRANTEE to the school bus vendor (and if applicable to the installer of the electric charging infrastructure) must be faxed to Ms. Lily Garcia at fax number (909) 396-3252 (or sent via email to lgarcia1@aqmd.gov) no later than **July 7, 2017.** Per CARB guidelines, a provision shall be explicitly included in the purchase order stating: "A withhold of $100 per bus per day will be imposed on the vendor by the SCAQMD for each day and each bus that is delivered after **March 30, 2018** to the GRANTEE." In addition, the purchase order shall include the following clause: "Bus vendor shall invoice SCAQMD directly for GRANTEE's award."

9. CALIFORNIA CARB HVIP INCENTIVES – School district, through its vendor, must apply and reserve the HVIP incentive from CARB for each new electric school bus. The CARB link to do so is:

   http://www.californiahvip.org

   Eligible electric school buses are listed at:

   http://www.californiahvip.org/docs/HVIP_Year4_EligibleVehicles.pdf

10. PAYMENT TERMS SCAQMD will pay for new electric school buses, Type C or Type D, in an amount not exceeding the base price (covering listed base options), and sales tax, less CARB's HVIP incentives for each bus.

11. DOCUMENTATION NEEDED FOR PAYMENT OF NEW ELECTRIC SCHOOL BUS(ES)
    GRANTEE shall coordinate with bus vendor to provide SCAQMD with the following documentation:
    a. **Original invoice** for each bus identifying:
       i. details of each new electric bus delivered including, but not limited to, the make, model year of the bus and drivetrain including its batteries, battery capacity, motor, etc.,, vehicle identification number (VIN), passenger capacity, gross vehicle weight and wheel-chair capacity, if any;
       ii. a clear copy or photo of the bus tag of each new electric school bus received
       iii. special options ordered by the school district over what is included in the base;
       iv. documentation of California CARB's HVIP incentives received
       v. Net SCAQMD's contribution over and above the HVIP incentive received
    b. **Cover letter** (an original) signed and dated by GRANTEE's Director of Transportation, or his/her equivalent, confirming, under penalty of perjury, the following:
       i. details of the new buses delivered as listed in Clause (a)(i) above;
       ii. grant number to which the invoice should be charged;
       iii. date when the bus was physically delivered to the school district;
       iv. approval of the invoice and its contents;
       v. amount of HVIP incentive funds received
       vi. amount of electric infrastructure funds requested
       vii. a request stating that SCAQMD pay its net contribution to the bus vendor directly; and
       viii. that the school district will pay its contribution (for special options) directly to the bus vendor.
    c. A copy of the **first page** of this Grant Award (that contains the Summary Table) and
    d. The above documentation must be received by SCAQMD on or before **May 15, 2018,** attention: Ms. Lily Garcia, TAO, SCAQMD, 21865 Copley Drive, Diamond Bar, CA 91765.
    e. The PDF scan of the whole invoice package
    f. An electronic file of the Grantee's current fleet inventory, with details of each school bus in the inventory. Please send this inventory by email to rgeorge@aqmd.gov

12. TERM OF OWNERSHIP - GRANTEE (school district) is required to own and operate the newly acquired electric school buses within the South Coast Air Quality Management District for **at least seven years** from the date of physical delivery. School district must operate a minimum of 6,000 miles per calendar year for 7 years. Failure to operate the electric school bus to this threshold (of 6,000 miles) may result in the transfer of the electric bus to another public school district. School district can choose to keep and operate the bus after the 7 year period.

13. RIGHT OF INSPECTION – Before payment of invoice, SCAQMD and/or CARB reserves the right to inspect all school buses and infrastructure purchased and/or installed pursuant to this Agreement.

14. ELECTRIC RECHARGING INFRASTRUCTURE – SCAQMD requires the following:
    a. that electrical charging infrastructure be installed by a licensed contractor;
    b. that the installing contractor have substantial direct experience in installing electrical charging infrastructure for heavy duty battery operated vehicles
    c. that the infrastructure funded under this Agreement comply with all applicable laws, regulations and codes including, but not limited to, those pertaining to building, safety, fire, health, public contracting and public works, and with any local codes that may provide additional safety;
    d. that a fire permit or equivalent certification be issued by a licensed engineer, a copy of which must be enclosed with the invoice for infrastructure;
    e. that the electrical charging infrastructure construction must be completed by **March 30, 2018**, unless SCAQMD grants a written extension due to exceptional circumstances; and
    f. that Grantee place an SCAQMD logo, as a permanent fixture, in a prominent location at their fueling station; the design and format of the SCAQMD logo will be provided by SCAQMD's program supervisor.

15. PREVAILING WAGES FOR INFRASTRUCTURE CONSTRUCTION. GRANTEE is alerted to the prevailing wage requirements of California Labor Code section 1770 et seq., and the compliance monitoring and enforcement of such requirements by the Department of Industrial Relations ("DIR"). GRANTEE and all of GRANTEE's subcontractors must comply with the California Public Works Contractor Registration Program and must be registered with the DIR to participate in public works projects. GRANTEE shall be responsible for determining the applicability of the provisions of California Labor Code and complying with the same, including, without limitation, obtaining from the Director of the Department of Industrial Relations the general prevailing rate of per diem wages and the general prevailing rate for holiday and overtime work, making the same available to any interested party upon request, paying any applicable prevailing rates, posting copies thereof at the job site and flowing all applicable prevailing wage rate requirements to its subcontractors. Proof of compliance with these requirements must be provided to SCAQMD upon request. GRANTEE and GRANTEE's subcontractors shall indemnify, defend and hold harmless the South Coast Air Quality Management District against any and all claims, demands, damages, defense costs or liabilities based on failure to adhere to the above referenced statutes.

16. DOCUMENTATION NEEDED FOR PAYMENT FOR ELECTRICAL CHARGING INFRASTRUCTURE
    GRANTEE shall coordinate with all infrastructure contractors to provide SCAQMD with the following documentation:
    a. **An itemized invoice** (an original) must be submitted from the infrastructure contractor verifying installation, acceptance and operation of the electric recharging station. The invoice should include applicable details of the equipment installed (make, model, year charging rate, etc., number of chargers etc.), the cost of materials and labor, sales tax, warranties, and, if applicable, maintenance agreement.
    b. **Evidence that a safety permit** or equivalent certification by a licensed engineer was issued for installation of the recharging station.
    c. **Cover letter** (an original) signed and dated by GRANTEE's Director of Transportation, or his/her equivalent, confirming, under penalty of perjury, the following:
        i. the invoice contents
        ii. the grant number to which the invoice needs to be charged
        iii. specific details of the work done
        iv. date of completion of infrastructure construction
        v. acceptance of the infrastructure construction
        vi. that SCAQMD should pay SCAQMD's contribution to the vendor directly,
        vii. that the SCAQMD logo has been permanently installed at the station.
    d. **Copies of the bid documents**, if any, issued by GRANTEE (school district), responses to the bid, engineering drawings in 8.5 by 11 size, and photos of the final installation.

17. DEADLINE FOR ALTERNATIVE FUEL STATION DOCUMENTATION – Above documentation for electric recharging station must be provided to SCAQMD no later than **May 15, 2018.** Please submit these documents to Ms. Lily Garcia, TAO, SCAQMD, 21865 Copley Drive, Diamond Bar, CA 91765.

18. NON-COMPLIANCE – SCAQMD reserves the right to cancel this Agreement or withhold payment for GRANTEE's non-compliance with the Agreement. Further, SCAQMD reserves the right to cancel the Agreement if it is not executed by GRANTEE within 30 days of the receipt of this Grant.

19. ENFORCEMENT – SCAQMD and CARB have the authority to enforce the terms of this Agreement at any time during the Agreement term plus two years. SCAQMD and CARB will seek whatever legal, equitable and other remedies are available for the GRANTEE's failure to comply with the terms of this Agreement or with the Lower-Emission School Bus Program requirements incorporated herein.

20. AUDIT RIGHTS – SCAQMD, CARB, and the California Department of Finance, or their designee(s), shall have the right to inspect the buses purchased under this Grant, electric recharging infrastructure, and review and copy any records and supporting documentation pertaining to the performance of this Agreement. GRANTEE agrees to allow the auditor(s) access to these new buses, and records during normal business hours and to allow interviews of any employees who might reasonably have information related to such these buses and records.

21. AUDIT OF SUBCONTRACTORS - GRANTEE must include a similar right, as Clause 20 above, for CARB, the State and SCAQMD, or their designee(s), to audit records and interview staff in any subcontract related to the performance of this Agreement.

22. REPORTING REQUIREMENTS - During the term of this Agreement, for the first 7 years, in January of each year, GRANTEE agrees to provide annual reports to SCAQMD on the accumulated mileage of its electric school buses and a copy of the annual CHP292 certification of each electric school bus.

23. RECORDS AND RECORDS RETENTION – GRANTEE shall maintain and retain records related to this Agreement for the Agreement term plus two years, or until **March 30, 2034**, whichever is later. These records shall be maintained in print form for the first seven (7) years of this Agreement but may be maintained electronically thereafter. These records include but are not limited to the following:
    A. Application and all documents provided with and subsequent to the application submittal;
    B. Vendor quotes for the new buses and electric recharging station;
    C. A copy of the CARB electric school bus certification for the electric school bus(es) purchased under this Agreement;
    D. Purchase orders for the buses and recharging station;
    E. Executed contracts;
    F. Proof of delivery of the new electric school bus(es) and special options purchased and installed on the bus(es);
    G. All invoice(s) related to the project including documents required for payment (refer to Clause 11);
    H. If GRANTEE paid its vendor directly, GRANTEE must retain proof of payment; and
    I. Maintenance records.

24. NOTICES – Any notices from either party to the other shall be given in writing to the attention of the persons listed below, or to other such addresses or addressees as may hereafter be designated in writing for notices by either party to the other. Notice shall be given by certified, express or registered mail, return receipt requested, and shall be effective as of the date of receipt indicated on the return receipt card.

SCAQMD: Ranji George, School Bus Program
South Coast Air Quality Management District
21865 Copley Drive
Diamond Bar, CA 91765-4178

GRANTEE:

25. ASSIGNMENT - The rights granted hereby may not be assigned, sold, licensed, or otherwise transferred by either party without the prior written consent of the other, and any attempt by either party to do so shall be void upon inception.

26. NON-EFFECT OF WAIVER - The failure of GRANTEE or SCAQMD to insist upon the performance of any or all of the terms, covenants, or conditions of this Grant, or failure to exercise any rights or remedies hereunder, shall not be construed as a waiver or relinquishment of the future performance of any such terms, covenants, or conditions, or of the future exercise of such rights or remedies, unless otherwise provided for herein.

27. INDEMNIFICATION – GRANTEE agrees to hold harmless, defend and indemnify SCAQMD, its officers, employees, agents, representatives, and successors-in-interest against any and all loss, damage, costs, lawsuits, claims, demands, causes of action judgments, attorney's fees, or any other expenses arising from or related to any third party claim against SCAQMD, its officers, employees, agents, representatives, or successors-in-interest that arise or result in whole or in part, from any actual or alleged act or omission of GRANTEE, its employees, subcontractors, agents or representatives in the performance of this Grant. This Indemnification Clause shall survive the expiration or termination (for any reason) of the Grant and shall remain in full force and effect.

28. ATTORNEYS' FEES - In the event any action is filed in connection with the enforcement or interpretation of this Grant, each party shall bear its own attorneys' fees and costs.

29. FORCE MAJEURE - Neither SCAQMD nor GRANTEE shall be liable or deemed to be in default for any delay or failure in performance under this Grant or interruption of services resulting, directly or indirectly, from acts of God, civil or military authority, acts of public enemy, war, strikes, labor disputes, shortages of suitable parts, materials, labor or transportation, or any similar cause beyond the reasonable control of SCAQMD or GRANTEE.

30. DE-OBLIGATION OF UNSPENT BALANCES - Upon thirty (30) days' written notice to GRANTEE, SCAQMD may de-obligate from the Grant funds that remain unexpended by the reimbursement deadline listed unless extended in writing. GRANTEE to initial here acknowledging consent to de-obligation of non-expended funding. _____

31. SUPERINTENDENT CERTIFICATION – By initialing here, Superintendent certifies that he/she had the authority to submit the application applying for the funds under this grant award and that the individual identified in Clause 24 (Notices) is the individual authorized to implement the project. _____

32. GOVERNING LAW - This Grant shall be construed and interpreted and the legal relations created thereby shall be determined in accordance with the laws of the State of California. Venue for resolution of any disputes under this Grant shall be Los Angeles County, California.

33. TERMINATION – GRANTEE's failure to comply with any term or condition of this Agreement shall constitute a material breach of this Agreement. SCAQMD will either notify the GRANTEE that it must timely cure this breach, or provide ten (10) days written notification of SCAQMD's intention to terminate this Contract. In addition, SCAQMD reserves the right to terminate this Agreement, in whole or in part, without cause, upon thirty (30) days written notice. Once such notice has been given, GRANTEE shall, except as otherwise directed by SCAQMD, discontinue any work being performed under this Agreement and cancel all of GRANTEE's orders in connection with such work, and shall use its best efforts to terminate existing subcontracts upon terms satisfactory to SCAQMD. Thereafter, GRANTEE shall perform only such services as may be necessary to preserve and protect any work already in progress and to dispose of any property as requested by SCAQMD. GRANTEE shall also promptly deliver to SCAQMD all copies of documentation and other information and data prepared or developed by GRANTEE under this Agreement. GRANTEE will be paid in accordance with this Agreement for work performed before the effective date of termination.

34. ENTIRE GRANT - This Grant represents the entire agreement between SCAQMD and GRANTEE and there are no understandings, representations, or warranties of any kind except as expressly set forth herein. No waiver, alteration, or modification of any of the provisions herein shall be binding on any party unless in writing and signed by the party against whom enforcement of such waiver, alteration, or modification is sought.

The undersigned parties agree to the terms and conditions as set forth in this Grant. The undersigned parties certify under penalty of perjury that they are duly authorized to bind the parties to this Grant.

GRANTOR:	GRANTEE:
South Coast	***( )Unified School District***
Air Quality Management District	
_____	_____
Signature of Authorized Official	***Signature of Authorized Official***
Name: Dr. William A. Burke	Name: _____
Title: Chairman, Governing Board	Title: _____
Date _____	Date _____

Appendix B

CERTIFICATIONS AND REPRESENTATIONS

1. Business Contact Information
2. W9-with EIN Taxpayer ID#

South Coast
Air Quality Management District
21865 Copley Drive, Diamond Bar, CA 91765-4178
(909) 396-2000 • www.aqmd.gov

Business Contact Information Request

Dear SCAQMD Contractor/Supplier:

The South Coast Air Quality Management District (SCAQMD) is committed to ensuring that our contractor/supplier records are current and accurate. If your firm is selected for award of a purchase order or contract, it is imperative that the information requested herein be supplied in a timely manner to facilitate payment of invoices. In order to process your payments, we need the enclosed information regarding your account. **Please review and complete the information identified on the following pages, complete the enclosed W-9 form, remember to sign both documents for our files, and return them as soon as possible to the address below:**

Attention: Accounts Payable, Accounting Department
South Coast Air Quality Management District
21865 Copley Drive
Diamond Bar, CA 91765-4178

If you do not return this information, we will not be able to establish you as a vendor. This will delay any payments and would still necessitate your submittal of the enclosed information to our Accounting department before payment could be initiated. Completion of this document and enclosed forms would ensure that your payments are processed timely and accurately.

If you have any questions or need assistance in completing this information, please contact Accounting at (909) 396-3777. We appreciate your cooperation in completing this necessary information.

Sincerely,

Michael B. O'Kelly
Chief Administrative Officer

DH:tm
Enclosures: Business Contact Information Request
W-9 tax form with EIN number

REV 2/11

Grant # _____
8 Pages

All applicants: Please return this completed page with Application

South Coast Air Quality Management District

21865 Copley Drive, Diamond Bar, CA 91765-4178
(909) 396-2000 • www.aqmd.gov

BUSINESS CONTACT INFORMATION REQUEST

Business Name	
Division of	
Subsidiary of	
Website Address	
Type of Business *Check One:*	☐ Individual ☐ DBA, Name _____, County Filed in _____ ☐ Corporation, ID No. _____ ☐ LLC/LLP, ID No. _____ ☐ Other _____

REMITTING ADDRESS INFORMATION

Address			
City/Town			
State/Province		Zip	
Phone	( ) - Ext	Fax	( ) -
Contact		Title	
E-mail Address			
Payment Name if Different			

All invoices must reference the corresponding Purchase Order Number(s)/Contract Number(s) if applicable and mailed to:

Attention: Ms. Lily Garcia, TAO, SCAQMD
21865 Copley Drive
Diamond Bar, CA 91765-4178

Please return this completed page with Application

Form **W-9**
(Rev. January 2011)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

Print or type
See **Specific Instructions** on page 2.

Name (as shown on your income tax return)

Business name/disregarded entity name, if different from above

Check appropriate box for federal tax classification (required): ☐ Individual/sole proprietor ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶

☐ Other (see instructions) ▶

☐ Exempt payee

Address (number, street, and apt. or suite no.)

Requester's name and address (optional)

City, state, and ZIP code

List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Social security number
☐☐☐ – ☐☐ – ☐☐☐☐

Employer identification number
☐☐ – ☐☐☐☐☐☐☐

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 4.

Sign Here **Signature of U.S. person ▶** **Date ▶**

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),

2. Certify that you are not subject to backup withholding, or

3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.