



October , 2012

Subject: POLA VSBE Truck Grant Program

To: POLA Very Small Business Enterprise Concessionaires:

The Port of Los Angeles (POLA or Port) is pleased to announce a new grant opportunity under POLA's Clean Truck Program (CTP) to fund clean trucks for Very Small Business Enterprises (VSBE) Concessionaires. As such, we have created the POLA VSBE Truck Grant Program (Program), using \$746,666 in grant funds directed to the CTP by the California Attorney General's office.

We are pleased to provide our certified VSBE Concessionaires with an opportunity to apply for a grant of \$25,000 towards the purchase of a 2007 EPA compliant (or newer) Class 8 drayage truck or \$50,000 for a 2007 EPA compliant (or newer) alternative fuel truck from a certified dealership.

The POLA VSBE Truck Grant Program Application Package can be downloaded from the POLA website at: VSBETruckGrants@e2managetechnology.com

In order to qualify for these funds, Concessionaires in good standing must be a certified VSBE and must submit an application for funding (included in the attached VSBE Truck Grant Program Application Package).

Selected Grantees will enter into a Grant Agreement with the Port to accept the funding and agree to comply with the VSBE Truck Grant Program requirements, a few of which are listed below:

- Annual 150 drayage trips to or from POLA or Port of Long Beach (POLB) terminals for three years
 - Minimum 450 trips to or from POLA/POLB in a three year period (225 trips must occur at POLA)
- Trucks may not be sub-leased and must list POLA as additional insured and as lien holder
- Provide copies of Grant Truck sale, title, registration, insurance, vehicle inspection and financing documents to POLA within 30 days of Grant fund receipt

Please review the Program Application Package closely and consider the Program requirements prior to submitting an application as these are not negotiable. All applications must be submitted to POLA by 5:00 P.M. Pacific Time on **INSERT DATE**.

We are anticipating receipt of more applications than available funding. If this becomes the case, all qualified applications meeting VSBE Program requirements will be entered into a random lottery. The ranked list from the lottery selection process will be posted, and selected Grantees will be notified.

Submit your questions to VSBETruckGrants@e2managetechnology.com or call 424-209-POLA. We hope you will consider taking advantage of this opportunity.

Sincerely,

Tim DeMoss
Clean Truck Program Manager

VSBE Truck Grant Program Application Package

Issued by:



The Port of Los Angeles

425 South Palos Verdes Street
San Pedro, Ca 90731

October 2012

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BACKGROUND

The City of Los Angeles Harbor Department (Harbor Department), which operates the Port of Los Angeles (Port or POLA) received \$746,666 in funds directed from the California State Attorney General's (Attorney General) office as the result of a Consent Judgment between five POLA Marine Terminal Operators (MTOs) and the Attorney General. Although POLA was not a party in the case, because the Consent Judgment involved Proposition 65 warnings regarding diesel engine exhaust at POLA terminals, the Attorney General recommended using the settlement funds in POLA's Clean Truck Program (CTP) to improve diesel emissions at POLA. In April 2011, the Harbor Department agreed to accept and administer the settlement funds as grants to assist the POLA's small business concessionaires to purchase clean trucks. The Harbor Department hopes to assist in the funding of 15 to 30 clean trucks depending on the types of trucks chosen by the applicants. On 2012, the Board of Harbor Commissioners (Board) approved the use of the Attorney General Settlement funds to offer CTP grants to POLA concessionaires who are Very Small Business Enterprises (VSBEs), thereby creating the VSBE Truck Grant Program (Program). This announcement provides information on the Program and includes an application for eligible concessionaires.

SECTION 1 PROGRAM OVERVIEW

The Port is accepting grant applications from POLA concessionaires in good standing who are certified VSBEs, for grants towards the purchase of a clean truck. The following is an overview of the program.

- Qualified applicants who are selected as Grantees and meet all Program requirements will receive \$25,000 to assist in purchasing a 2007 (or newer) U.S. Environmental Protection Agency (EPA)-compliant diesel truck or \$50,000 for a 2007 (or newer) EPA-compliant alternative fuel truck, from a certified dealership.
- VSBE status must be certified prior to applicant selection. See Appendix B for additional information on the Port's Small Business/Very Small Business program, eligibility requirements, and the VSBE verification process. VSBE status of the applicant is only required as of the Agreement date. If a Grantee's business grows such that it is no longer a VSBE after such date, it will not affect this Agreement.
- Grantees will not be required to scrap another truck in order to receive funding.
- If the number of applications exceeds the limited amount of grant money available, Grantees will be selected through a lottery and a rank-order list of selected Grantees and alternates shall be posted on the Port's website. In the event that any selected Grantees are unable to execute their grant agreement or otherwise fail to complete their grant transaction, then grants may become available to alternates in rank order on the lottery list until all grant funds are expended.
- In order to receive funds, Grantees will be required to enter into a Grant Agreement with the Port to accept the funding and comply with all of the requirements set forth in the Grant Agreement (see Appendix D) for a 3-year term.
- Under the Grant Agreement, a Grantee may acquire one new or used 2007 EPA compliant Class 8 drayage truck (or newer) for which they will receive \$25,000 to assist in purchasing a diesel truck or \$50,000 for an alternative fuel truck.
- The Grantee is prohibited from sub-leasing the truck, and must list the Port as additional insured, as well as an additional lien holder (or make other arrangements acceptable to the Port in the event of restrictions by Grantee's first lien lender).
- The Grantee is required to make 450 Drayage Service Trips over three (3) years (225 trips must be at POLA):
 - Each truck must complete at least 150 total annual trips at the POLA and the Port of Long Beach for each year of the 3-year term.
 - Minimum 450 trips to or from POLA/POLB in a three-year period (225 trips must be at POLA)
 - The Port will assess the compliance status of each Grant Vehicle annually and the Grantees will be notified of their trip status each year.

- Repayment may be required for missing annual minimum 75 trips or total 450 trips over three-year period.
 - If a Grant Vehicle has made 450 Drayage Service Trips prior to the end of the 3-year term, the Grantee shall be deemed to have satisfied the drayage service requirement and additional trips are not required.
 - Program participants who are below the annual trip compliance level will be required to compensate the Harbor Department a pro-rated dollar amount equal to the percentage of deficient trips times the amount of the grant award received.
- Post-award monitoring will verify that all grant recipients remain compliant and in good standing through the life of their agreement with the Port.

The following sections provide additional details on the Program requirements and schedule. Grant Applications are due 30 days after the Program Announcement is released. Questions regarding this Program and/or the application process should be directed to the VSBE Truck Program administrator at VSBETruckGrants@e2managetech.com and 424-209-POLA.

SECTION 2 PROGRAM REQUIREMENTS

The following definitions and descriptions are intended to clarify key components of the Program.

Eligible Grant Vehicle - A new or used, diesel-fueled or alternative-fueled, Class 8 On-Road Vehicle with a Gross Vehicle Weight Rating greater than 33,000 pounds, equipped with a heavy duty engine that meets or exceeds 2007 model year California or federal heavy-duty Diesel-Fueled On-Road emissions standards. Grant vehicle must be purchased from a California DMV licensed vehicle dealership.

Grant - A grant to a VSBE approved by the Port, up to a maximum of \$25,000 per each diesel-fueled Grant Vehicle, or a maximum of \$50,000 per each alternative-fueled Grant Vehicle.

Drayage Service -Transporting containers and/or other cargo to or from marine terminals located in the Port or Port of Long Beach, with the requirement that at least 75 trips must be to or from the Port each year.

Drayage Service Trips to San Pedro Bay Ports - During the 3-year term for each Grant Vehicle, Grantee shall not make less than four hundred fifty (450) drayage service trips with such Grant Vehicle (225 trips must occur at POLA), in compliance with the Port's tariffs and contract requirements.

- Each truck must complete 150 annual trips at the POLA and the Port of Long Beach for each year of the 3-year term.
- The Port will assess the compliance status of each Grant Vehicle annually and the Grantees will be notified of their trip status each year.
- Repayment may be required for missing annual minimum 75 trips or total 450 trips (including 225 trips at POLA) over three-year period.
- If a Grant Vehicle has made 450 Drayage Service Trips (225 trips must be at POLA) prior to the end of the 3-year term, the Grantee shall be deemed to have satisfied the drayage service requirement and additional trips are not required.
- Program participants who are below the annual trip compliance level will be required to compensate the Harbor Department a pro rata dollar amount equal to the percentage of deficient trips times the amount of the grant award received.

Concession Agreement -At all times during the contract term for each Grant Vehicle, Grantee shall comply with all of its obligations under the Concession Agreement between the Port and Grantee.

VSBE - For the purposes of this Agreement, VSBE means a small business that has average annual gross receipts of \$3,500,000 or less within the previous 3 years, that is also a licensed motor carrier in good standing that has a valid Concession Agreement with the Port. VSBE

status must be certified prior to applicant selection. See Appendix B for additional information on the Port's Small Business/Very Small Business program, eligibility requirements, and the VSBE verification process. VSBE status of the applicant is only required as of the Agreement date. If a Grantee's business grows such that it is no longer a VSBE after such date, it will not affect this Agreement.

Drayage Truck Registry and Drayage Service - Grantee shall acquire title to the Grant Vehicle specified in Schedule 2 of the Grant Agreement, register the Grant Vehicle in the State of California's Drayage Truck Registry and the Port's Drayage Truck Registry and place the Grant Vehicle into drayage service within 90 days after the date of the Grant Agreement.

Term. The Grant Agreement between the Grantee and the Port shall be effective upon execution and delivery of the Grant Agreement by both of the parties and shall remain in effect, for each Grant Vehicle, until the earlier of three (3) years or the Grant Vehicle's completion of 450 Drayage Service Trips.

Sale, Sublease or Assignment. Grantee may not assign, sell, lease, transfer, license, or subcontract any rights or obligations under the Grant Agreement or in any Grant Vehicle to a third party without the prior written consent of the Port until the Grant Agreement and all liabilities and obligations secured by it have been fully satisfied by Grantee. If the Grantee desires to sell, lease or otherwise dispose of any interest in any Grant Vehicle for any reason prior to the end of the Term, the Grantee shall notify the Port and any such sale, lease, or disposition shall be subject to the prior written consent for the transaction from the Port.

Additional Insured. Each policy shall include an additional insured endorsement (CG 2010 or equivalent) naming the City of Los Angeles Harbor Department, its officers, agents and employees as Primary additional insured's, a 10-days' notice of cancellation for nonpayment of premium, and a 30-days' notice of cancellation for any other reasons.

Financing/Lien Holder. If Grantee obtains a loan, financing, or other obligation for any portion of the purchase price of a Grant Vehicle, then Grantee (i) shall provide a copy of such loan or financing documents to the Port, and (ii) shall cause the lender, financier or secured party to (A) acknowledge the Port's security interest in such Grant Vehicle, (B) agree to give notice to the Port of any default by Grantee with respect to such loan, financing or other obligation, and (C) agree to give notice to the Port prior to releasing its security interest in such Grant Vehicle (upon the release of such security interest, at the Port's request, Grantee shall cause the "HARBOR DEPARTMENT, CITY OF LOS ANGELES" to be identified as lienholder on the certificate of title for such Grant Vehicle and, following any such request, the "HARBOR DEPARTMENT, CITY OF LOS ANGELES" shall continue to be so named as lienholder for the remaining Term for such Grant Vehicle); and (iii) authorize the Port to pay (but with no obligation on the Port to pay) each Grant directly to such lender, financier or secured party.

Contract Documentation

Once an applicant has been notified that they have been selected to receive funding, the

applicant has 30 days to provide the Port with the following pre-funding documentation in order to move forward with contracting:

- An invoice for the chosen vehicle. The invoice must show, at a minimum, the dealership from which the vehicle is purchased, the purchase price, the make, model and GVWR of the selected vehicle.
- An inspection report on the selected vehicle, more specifically a Federal Annual Inspection in accordance with 49 Code of Federal Regulations (CFR), Part 396, Federal Motor Carrier Safety Regulation (FMCSR), conducted within 12 months prior to or one month following the date of purchase of the Grant Vehicle.
- And, if financing is required to find the remaining portion of the vehicle, a letter demonstrating approved financing or other source of funds for the non-Grant portion of the Grant Vehicle purchase price.

Once the documents are received, the Port will send the Grant Agreement to the Grantee to be signed and returned within 2 weeks of issuance by the port. The Port will then sign and execute the contract and provide a dual-party check to the Grantee.

Post-Funding Documentation. A copy of the following documents, with respect to each Grant Vehicle, are to be submitted to the Port within 30 days of the Grant Agreement date:

- Final Bill of Sale,
- Certificate of Title reflecting Port as Lienholder or alternative satisfactory to the Port for financed vehicles,
- Vehicle Registration,
- Insurance Certificate or other evidence of insurance satisfactory to the Port,
- Copy of Annual Federal Vehicle Inspection, and
- Loan or Financing Documents if any portion of the purchase price of the Grant Vehicle was financed.

Grantees will have 90 days from the date of the agreement to:

- Register the Grant Vehicle in the State of California's Drayage Truck Registry
- Register the Grant Vehicle in the Port's Drayage Truck Registry
- Place the Grant Vehicle into drayage service at the Port

Annual Reporting. Grantee shall submit annual reports on each Grant Vehicle that include the following information:

- Updated Grantee contact information (name, address, phone etc.);
- Proof of Grant Vehicle's current State of California Department of Motor Vehicles registration;
- Documentation evidencing the number of Grant Vehicle's Drayage Service trips to the San Pedro Bay Ports, or if requested by the Port, verification of a Trip Report provided by the Port;
- Grant Vehicle's annual miles traveled (including mileage/activity logs for documentation);
- Grant Vehicle's current odometer reading;
- Summary of Grant Vehicle's maintenance performed and inspections conducted;
- Certification that the Grant Vehicle was operated in accordance with this Agreement and the Concession Agreement, and that all information in such certificate, the annual report and submitted therewith is true and accurate; and
- Any other information reasonably requested by the Port or its designated administrator in order to verify compliance with the Program.

The first annual report for each Grant Vehicle is due 30 days after the first anniversary date of Grantee acquiring title to such Grant Vehicle and on each ensuing anniversary date of such delivery thereafter and, in each case, shall cover the 1-year period ending on such date.

Grant Program Default. Grantees will be required to repay portions of the grant for failure to make 75 minimum trips on an annual basis, and to repay portions of the grant for failure to make all 475 San Pedro Bay Ports trips following the end of the three-year term.

If the grantee is unable to make at least 75 annual drayage service trips, the grantee shall repay the Harbor Department within thirty (30) days of notice, a pro rata amount calculated as the failed percentage of 75 drayage service trips times one-sixth of the amount of the Grant received by the grantee for the truck. For example, if a grantee received \$25,000 and the truck failed to make 6 of the minimally required 75 drayage service trips, then the failed percentage is 8 percent (6 divided by 75), and the grantee would be required to repay 8 percent of \$4,116.67 (one-sixth of Grant amount), or \$333.33.

Furthermore, if a grantee is below compliance for total annual trips (150 trips) in a particular year, they will be given the opportunity to achieve compliance by making up trips in later years. However, if the grantee is unable to complete 450 drayage service trips over the 3 year agreement, the grantee will be required to compensate the Harbor Department a pro rata

dollar amount equal to the percentage of deficient trips times the amount of the grant award received minus any of the previous annual penalties previously paid by the grantee. For example, if a Grantee received \$25,000 and its Grant Vehicle failed to make 50 of the required 450 Drayage Service Trips, then the failed percentage is 11 percent (50 divided by 450), and Grantee would be required to repay 11 percent of \$25,000, or \$2,750. If the Grantee previously paid \$333.33 for the first year's non-achievement of minimum Drayage Service Trips as described in Section 4.B.1, above, then the net final amount due would be \$2,750 less the previously paid \$333.33 or \$2,416.67.

SECTION 3 SCHEDULE OF EVENTS

The following is a schedule of events for the Program:

Process	Program Milestone	Timeline
Step 1 Application	Grant Program Announcement Released	_____ 2012
	Grant Applications Due	_____ 2012
	Grant Selection & Award Notification	_____ 2012
Step 2 Selection & Contracting	Pre-funding Documents Due	30 Days after Award Notification
	Signed Grant Agreements Due	2 Weeks after receiving Grant Agreement
	Fully Executed Grant Agreement and Payment Issued by Port	3 Weeks after receiving executed Grant Agreement
Step 3 Post-Award	Post-Funding Documents Due	30 Days after Grant Agreement Date
	Vehicle Operation Verification	90 Days after Grant Agreement Date

3.1 Grant Application – Step 1

Grant Program Announcement Release – Upon Board approval, all eligible POLA Concessionaires will be made aware of the VSBE Grant Program through emails and website postings and will be invited to apply for the Program, which will include registering as a VSBE.

Grant Application Submittal - Each applicant must be a Concessionaire in good standing¹ and a certified VSBE, defined as a small business that has average annual gross receipts of \$3,500,000 or less within the previous three years. Qualified VSBEs interested in participating in the Program must take the following action prior to the Grant Application Submittal deadline:

¹ A Concessionaire in good standing is in compliance with all the terms of the Concession Agreement.

- 1) Submit Grant Application Form (Appendix A)
- 2) Submit VSBE Verification Forms (Appendix B) to:

Port of Los Angeles
VSBE Grant Truck Program
Attn: Program Administrator
5000 E. Spring Street Suite 720
Long Beach, CA 90815

The Port will answer any questions while the application period is open. All applications are due within 30 days of the Program Announcement release.

Submit questions to VSBETruckGrants@e2managetechnology.com or call 424-209-POLA.

3.2 Contracting - Step 2

Grant Selection & Award Notification – If the requested funding in applications exceeds the amount of VSBE Grant funds available, grantees will be chosen through a lottery. The Harbor Department will publish a ranked list of selected grantees on its website and notify the list of grantees that have been selected for a VSBE Truck Grant as well as alternates that may be awarded grants in the event any selected grantees are unable to complete their grant transaction. Those selected for a VSBE Truck Grant will be notified no later than 30 days after the application due date.

Pre-funding Documents – In order to receive a Grant Agreement, all selected Grantees must submit the following pre-funding documents, no later than 30 days after receiving award notification.

- Vehicle Information Form (Appendix C), containing information about the Grant Vehicle and source of non-Grant funds for purchase including:
 - Copy or draft of sales invoice for the Grant Vehicle,
 - Copy of a Federal Annual Inspection on the Grant Vehicle, and
 - Letter showing financing approval (if financing will be utilized).

The documents listed above should be submitted to the Program Administrator at:

Port of Los Angeles
VSBE Grant Truck Program
Attn: Program Administrator
5000 E. Spring Street Suite 720
Long Beach, CA 90815

Grant Agreement – Upon receipt and verification of completeness of the pre-funding documents, the Port will issue Grant Agreements for signature via standard mail. Grantees must return signed Grant Agreements within two weeks from when it was received by the port. Signed Grant Agreements should be addressed to the Program Administrator as stated above.

Payment – Once the signed Grant Agreement has been returned to the Port and all pre-funding requirements met, the Port will return the fully executed Grant Agreement and issue a dual-party check to the Grantee and the associated California Department of Motor Vehicles (DMV) licensed vehicle dealership (truck dealership). It is anticipated that for Grantees who submit complete contract documentation within Program deadlines, the Port, will issue Grant checks within three weeks of after the issuance of the signed Grant Agreement by the port.

3.3 Post Award Monitoring - Step 3

Post-Funding Documents – Grantee must submit the following post-funding documents to the Program Administrator no later than 30 days after the executed grant agreement and Port issued payment are received:

- Copy of the final bill of sale
- Certificate of Title reflecting Port as lienholder (or alternative acceptable to the Port for financed vehicles)
- Copy of Vehicle registration
- Copy of insurance certificate or other evidence of insurance satisfactory to the Port
- Copy of Annual Federal Vehicle Inspection
- Copy of loan or financing documents required under Section 4F of the Contract, if any portion of the purchase price of the Grant Vehicle was financed

Grantees will have 90 days from the date of the agreement to:

- Register the Grant Vehicle in the State of California's Drayage Truck Registry
- Register the Grant Vehicle in the Port's Drayage Truck Registry
- Place the Grant Vehicle into drayage service at the Port

On an annual basis, Grantees must:

- Update Grantee contact information (name, address, phone etc.);
- Show proof of the Grant Vehicle's current California vehicle registration;
- Provide documentation evidencing the number of Grant Vehicle's Drayage Service trips to the San Pedro Bay Ports, or if requested by the Port, verification of a Drayage Service Trip Report provided by the Port;

- Show Grant Vehicle's annual miles traveled (including mileage/activity logs for documentation);
- Provide Grant Vehicle's current odometer reading;
- Provide a summary of Grant Vehicle maintenance performed and inspections conducted;
- Show certification that the Grant Vehicle was operated in accordance with this Agreement and the Concession Agreement, and that all information in such certificate, the annual report and submitted therewith is true and accurate; and
- Provide any other information reasonably requested by the Port or its designated administrator in order to verify compliance with the Program.

During the term of the contract, the Grantees must:

- Make the Grant Vehicle available for inspection
- Maintain proper California vehicle registration for the Grant Vehicle
- Maintain adequate records of Grant Vehicle operation
- Maintain adequate insurance as specified by the Port
- Maintain Grant Vehicle in good operating condition according to manufacturer's records

SECTION 4 GRANT SELECTION

Applicant Selection

- The Port will review all applications for completeness.
- The Port will verify the accuracy of all application information and follow up on any missing information. Applicants that fail to deliver missing information within two weeks of notice will have applications deemed incomplete and will not be considered.
- If the requested funding in applications exceeds the amount of VSBE Grant funds available, qualified grantees will be chosen at random via a lottery. The Harbor Department will publish a ranked list of selected grantees on its website and notify the list of grantees that have been selected for a VSBE Truck Grant as well as alternates that may be awarded grants in the event any selected grantees are unable to complete their grant transaction.

Appendix A:
Grant Application Form
(Required for Step 1: Application)

Grant Application Form

All information provided in this application will be used by Port of Los Angeles (Port) staff to evaluate the eligibility of this application to receive program funds. Port staff reserves the right to request additional information and can deny the application if such requested information is not provided by the requested deadline. Incomplete or illegible applications will be returned to applicant or vendor, without evaluation. An incomplete application is an application that is missing information critical to the evaluation of the project.

Legal Company Name: _____

Form of Entity and State of Incorporation/Organization/Partnership/Domicile:

Business Address: _____

Key Company Contact for Grant: _____

Telephone: _____ **Facsimile:** _____

E-mail: _____

Port of Los Angeles Concession No.: _____

- I certify to the best of my knowledge that the information contained in this application is true and accurate and shall immediately advise the Port of Los Angeles in writing if any such information changes or ceases to be true and correct.
- I certify that if selected, I will comply with the terms of the Program.
- I understand that if selected for grant funding, there may be conditions placed upon receiving a grant and agree to refund the grant (or pro-rated portion thereof) if it is found that at any time I do not meet those conditions and if directed by the Port in accordance with the contract agreement.
- I have the legal authority to apply for grant funding for the entity described in this application.

☐ I am currently certified as a Very Small Business Enterprise (VSBE).

Applicant's Signature

Date

Applicant's Name (please print)

Title

Appendix B:

Very Small Business Enterprise Verification Forms

- 1. VSBE Verification Information**
- 2. VSBE Verification Form**
- 3. VBSE Income Verification – Sample Letter
(Required for Step 1: Application)**

Appendix C:
Vehicle Information Form
(Required for Step 2: Contracting)

Vehicle Information Form

Section 1: Grant Vehicle Information

Vehicle Make	Vehicle Model	Vehicle Model Year	GVWR
VIN (Vehicle Identification Number)		License Plate	State of Registration

Section 2: Licensed Dealership Information

Dealership	License #	Address	Phone
Sales Representative	Phone	Email	

Section 3: Grant Vehicle Engine Information

Engine Make	Engine Model	Engine Model Year	Engine Serial Number
Fuel Type <input type="checkbox"/> Diesel <input type="checkbox"/> LNG <input type="checkbox"/> Other _____	Horsepower	Engine Family Name	

Section 4: Costs and Funding

Total Cost For Grant Vehicle	
Equipment Cost	\$
Tax	+ \$
Dealer Fees	+ \$
TOTAL VEHICLE COST	= \$
Financed Amount	\$
Lender and Term	[Lender Name] [X Years]
VSBE Grant Amount	\$
Grantee's Cash Amount	\$
TOTAL ALL SOURCES OF PAYMENT	= \$

Section 6: Contract Documents Checklist

- ☐ Copy or draft of sales invoice for the Grant Vehicle,
- ☐ Copy of an inspection on the Grant Vehicle, and
- ☐ Letter showing financing approval (if financing will be utilized)

Appendix D – Sample Agreement

Insert sample contract once it has been finalized by the port.