



## **Annual Reporting Terms and Conditions**

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This document is designed to provide participants with the required instructions and guidance for the successful completion of their annual report. SJVAPCD staff will send an annual report to the mailing address listed in the application thirty (30) days prior to the due date. Annual reports must be submitted for the length of the participant's contract and are due each year on the anniversary of the date the retrofit or replacement vehicle(s) were purchased and placed into service. The Project Life timeframe varies based on project type; please refer to the Obligations of Participant section of your agreement for specifics. Noncompliance with these reporting requirements is a breach of your agreement and shall require onsite monitoring by SJVAPCD staff, and includes, missing or incomplete annual reports. Please review the Annual Report Packet Checklist (see page 5) to ensure all required documents are submitted for a **complete** Annual Report Packet.

SJVAPCD staff is available to answer questions and to provide assistance to participants regarding these procedures. It is advisable that you read the entire Annual Reporting Terms & Conditions document and executed agreement in order to fully understand the grant requirements. All questions regarding these agreement terms and conditions should be directed to:

San Joaquin Valley Air Pollution Control District  
Strategies and Incentives Department  
1990 East Gettysburg Avenue  
Fresno, CA 93726-0244  
(559) 230-5800  
Fax: (559) 230-6112

## **Step by Step Annual Report Guidance**

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This section outlines the information requirements for each field of the annual report. **Please fill out a separate annual report form for each piece of equipment that you have an agreement for.** If you need additional assistance, please contact the Strategies and Incentives (SI) Department and a SI staff member will assist you.

### ❖ **Report Year**

Indicate the year for which you are submitting the annual report. For example, if you are required to submit annual reports for five (5) years, and this is the first year you will be submitting a report, the Report Year would be "1".

### ❖ **Date**

Indicate the date the annual report was completed.

### ❖ **Project Number**

The number the SJVAPCD assigned your project; this information can be found in your agreement.

### ❖ **Organization**

The organization's legal name that entered into agreement with the SJVAPCD. This information was entered into Section 1 of the application and must be **identical** to the information on the Form W-9.

### ❖ **Primary Contact Name**

The first and last name of the person that serves as the primary contact to the SJVAPCD for the project.

❖ **Street/Mailing Address**

The mailing address used by the organization, including city, state, and zip code.

❖ **Phone Number**

The main phone number, including area code, for the primary contact.

❖ **Fax Number**

The fax number, including area code, for the primary contact.

❖ **Email Address**

The email address for the primary contact.

❖ **Vehicle Address**

The physical location of the vehicle, either as a street address which includes the city, and zip code, or by major cross streets.

❖ **Engine/Vehicle/Retrofit Make, Model, Model Year, Serial Number, and Identification Number**

This Annual Report Form is universally used for all project types in the Proposition 1B: Goods Movement Emission Reduction Program. Not all equipment information fields will apply to your project. You are only required to provide the information in the section (Retrofit, Truck Replacement, or Repower) which pertains to your project. Please leave all other fields blank, or write "N/A".

❖ **Annual vehicle miles traveled during the past year**

Provide the total annual miles traveled by the vehicle during the past year.

❖ **Percent of vehicle miles traveled within California**

Provide the percentage of the vehicle's annual miles traveled during the past year within California. The total percentage should not exceed 100.

❖ **Odometer Reading and Date**

Provide the current odometer reading and date the reading was taken.

❖ **Percent of vehicle miles traveled within California trade corridors**

Provide the percentage of the vehicle's annual miles traveled during the past year within each of the California trade corridors. Use the Other category to describe any mileage traveled outside of the main corridors.

❖ **Identify any maintenance or inspections performed on the engine/vehicle/retrofit during the past year**

Describe briefly, any maintenance that was performed to the engine/vehicle/retrofit during the past year.

❖ **Identify any conditions that significantly affected the vehicle's percentage of miles traveled in California, the Central Valley or California trade corridors**

Describe any conditions that may have significantly affected the percent usage of the vehicle over the past year.

❖ **Other Comments**

List any further comments here.

## PROPOSITION 1B PROGRAM ANNUAL REPORT

**Please complete a separate Annual Report for each engine/vehicle/retrofit in your project.**

Report Year:	Date:	Project Number:	Engine Number:
Organization:			
Primary Contact Name:			
Street/Mailing Address:			
City:	State:	Zip Code:	
Phone Number:	Fax Number:	Email Address:	
Vehicle Address:			

**Required for Retrofit Projects only**

Vehicle Make:	Vehicle Model:	Vehicle Model Year:	Vehicle Identification Number:
Engine Make:	Engine Model:	Engine Model Year:	Engine Serial Number:
Retrofit Make:	Retrofit Model:	Retrofit Model Year:	Retrofit Serial Number:
Annual vehicle miles traveled during the past year: _____		Percent of vehicle miles traveled within CA _____%	
Odometer Reading:		Date:	
Percent of vehicle miles traveled within California trade corridors: Central Valley: _____% Bay Area: _____% LA/Inland: _____% San Diego/Border: _____% Other: _____%			

**Required for Truck Replacement or Repower Projects only**

Vehicle Make:	Vehicle Model:	Vehicle Model Year:	Vehicle Identification Number:
Engine Make:	Engine Model:	Engine Model Year:	Engine Serial Number:
Annual vehicle miles traveled during the past year: _____		Percent of vehicle miles traveled within CA _____%	
Odometer Reading:		Date:	
Percent of Vehicle Miles Traveled within California trade corridors: Central Valley: _____% Bay Area: _____% LA/Inland: _____% San Diego/Border: _____% Other: _____%			

**Additional Equipment Information (Required for all project types)**

Identify any maintenance or inspections performed on the engine/vehicle/retrofit during the past year:
Identify any conditions that significantly affected the vehicle's percentage of miles traveled in the Central Valley or California trade corridors during the past year:
Other Comments:

<b>Internal Use Only</b>	
Reviewed By (Initial & Date):	
Follow-up Action Required?	Yes    No

## CERTIFICATIONS

**\*\*\*Please initial and sign in blue ink\*\*\***

I attest and certify to **all** the following by **initialing each of the following sections**:

**Initial** \_\_\_\_\_ During the last year, the truck identified in this annual report operated only in California.  
Permits were not utilized to make out-of-state trips.

**Initial** \_\_\_\_\_ During the last year, at least ten percent (10%) of the miles traveled by the truck identified  
in this annual report were traveled in the Central Valley trade corridor.

**Initial** \_\_\_\_\_ During the last year, the project was operated in accordance with the signed agreement  
with the SJVAPCD and all information submitted on the annual report and supporting  
documentation is true and accurate.

\_\_\_\_\_  
**Contract Signing Authority Signature**

\_\_\_\_\_  
**Date**

## ANNUAL REPORT PACKET CHECKLIST

When submitting an annual report packet, please submit the following for a **complete** packet. A complete annual report packet includes the following items:

- Complete **Proposition 1B Annual Report Form**.
- Proof of California Registration** for the past year.
  - The VIN of the vehicle identified in the annual report must be indicated on the proof of registration.
- Completed **Certifications** section, initialed and signed in **blue ink**.
- Current **Proof of Insurance** for the vehicle.

Please mail all complete annual report packets to:

Strategies and Incentives Department  
San Joaquin Valley Air Pollution Control District  
1990 East Gettysburg Avenue  
Fresno, California 93726-0244