

## EPA's Solar for All Planning Period Guidance

### What to Include in Initial Timeline and Workplan:

- **Timeline:** Clearly note planning period tasks in the timeline throughout the length of the planning period (up to 12 months)
  - Your timeline should reflect no/full/or partial planning period
    - No planning period-implementation for technical and financial assistance are fully developed and grantee seeks to remove both the 2% and planning period term and condition concurrently
    - Partial planning period -planning will be concurrent with approved financial and technical assistance during the planning period
    - Full planning period-grantee will utilize the full 12-month timeline to develop the implementation plan for financial and technical assistance
    - Planning activities should be clearly identified in the timeline as distinct from deploying approved technical assistance and financial assistance (refer to the SFA Grantee Timeline Example)
- **Workplan:**
  - **Planning Tasks:** Embed as much detail in the workplan as is currently available, while providing room for additional details to be developed
    - Consider writing planning tasks in an easy to update format, e.g. by starting these planning statements with “In the planning period”
  - **Budget:** The budget must account for the entire grant award (EPA funding, in-kind, and program income) in the workplan submittal, even if the budget will be refined during the planning period
  - **Align with Timeline Tasks:** Planning tasks discussed in the workplan must be explicitly mentioned as a planning period task in the timeline, including start and end dates
  - **Example:**
    - Workplan Text:
      - “In the planning period, long-term asset management concerns – such as maintenance plans, adequacy of replacement reserves, and plans for decommissioning and recycling of solar equipment at the end of project life – will be integrated into project underwriting guidelines and loan portfolio monitoring activities.”
    - Timeline:

Develop long-term asset management strategy around maintenance plans, adequacy of replacement reserves, and plans for decommissioning and recycling of solar equipment at the end of project life	1/1/2025	6/1/2025
---	----------	----------

### Planning Period

- **Awardee Access to Funding**
  - After the detailed budget and workplan have been approved, the 2% condition on drawdown will be removed from the award

- The planning period term and condition will remain in the award until all program planning is completed
- Awardee can only **drawdown funds** on the EPA-approved portions of the workplan
- If program activities are added or revised after approval, awardees will need to follow the approval process before drawing down funds to support those activities
- **Updates During the Planning Period**
  - **Recipient finalizes details within bounds of the approved workplan:**
    - Updates on details that are laid out within the approved workplan should be included in the semi-annual report
  - **Material Updates to the Planning Period Requiring Workplan Approval**
    - Prior approval from EPA is required for changes to budget and program plans in accordance with [2 CFR 200.308](#), [2 CFR 200.407](#), and EPA SFA terms and conditions
    - Costs on these tasks cannot be drawn down until EPA provides notification that the changes are approved
    - This process can be iterative and require multiple requests to EPA project officers

### **Ending the Planning Period**

- **End of Planning Period:** The planning period must conclude no later than 365 calendar days after the date of award for the first amendment of the agreement
- **Documents Required for Removing the Term and Condition:** All documents should no longer mention program planning and all activities should be clearly defined with a timeline and should align with the budget narrative
  - Revised Workplan
  - Revised Budget Narrative
  - Revised Timeline
  - Revised SF-424A (if necessary because of changes in budget categorization)
- **Removal of Term and Condition:** Once EPA approves the above documents, and the planning period is no longer needed for the grantee, EPA will remove the “2. Specific condition on revisions to EPA-approved Solar for All workplan in the one-year planning period” term and condition, as required by 2 CFR 200.208(e), and the recipient may then request payments for the revised work that has been approved by EPA. The removal of the term and condition will require a formal amendment and new notice of award.