

## Program Continuity Worksheet

**Purpose:** Ensure no disruptions occur when team members leave or are unavailable by documenting who does what and what access they use. Notes are included for each category as reminders of things involved in the tasks below.

**Instructions:**

For each task listed:

Current Owner – Write who is responsible.

Backup Owner – Name someone who can step in if needed.

Tools/Access Needed – List required logins, software, or accounts (e.g., admin permissions, shared drives, licenses).

### MANAGEMENT

Note any staff changes; Bring new staff up to date on roles and expectations; Convene all task owners to review annual program timeline; Update WRF

Task/Area	Current Owner	Tools/Access Needed
	Backup Owner	
Update Operations and Policy Manuals		
Staffing		

## ANNUAL PLAN MEETINGS & CONTRACT

Publish draft plan; advertise public meetings; generate script or presentation; Meeting minutes; Confirm all required uploads are in PAGE; notify DOE PO of submission; Accept award in FedConnect

Task/Area	Current Owner	Tools/Access Needed
	Backup Owner	
Public Hearings		
PAC Meetings		
Submit Plan to DOE; Accept Award		

## MONITORING

Finalize monitoring schedules; Distribute monitoring schedule to the network; Record completed monitoring visits, issue reports; Risk assessment; Monitoring analysis; Submit the Quarterly Federal Financial Report (FFR) in PAGE; Submit Quarterly Program Report (QPR) in PAGE

Task/Area	Current Owner	Tools/Access Needed
	Backup Owner	
Financial		
Technical/Field		
Administrative/programmatic		

## TECH MATERIALS & TOOLS

Solicit input from network stakeholders; update resources as needed; communicate with DOE technical contact; Implement any training courses and track completions and certifications; distribute training plan to network

Task/Area	Current Owner	Tools/Access Needed
	Backup Owner	
Health and Safety Plan		
T&TA Plan/Training and Tracking		
QCI Inspection Form /Tech Monitoring Form		
Energy Audit/Priority List Variances		

## BUDGET/FISCAL

Review Carry-over projections; Budget / Subgrantee Allocations; Budget Justification; Review and Approval of Budget; Review spending and production benchmarks to identify any potential issues

Task/Area	Current Owner	Tools/Access Needed
	Backup Owner	
Admin / Fiscal Monitoring Instrument		
Budgeting		
Indirect Rate Agreement / Cost Allocation Plan		
Quarterly Spending & Production review		

## OTHER

Submit the Annual T&TA, Monitoring and Leveraging Report for the previous Program Year in PAGE; SF-424; SF 424A;  
Submit the annual Historic Preservation report; Review waiting lists and determine any needed program changes; Update any specific information on your program's website (eligibility requirements, state plan, forms, etc.)

Task/Area	Current Owner	Tools/Access Needed
	Backup Owner	
Update Program Website		
Contract Executions		
Annual PAGE Reporting		
Quarterly Waiting Lists Review		

Tip: Update this worksheet regularly and store it securely where the team can access it.