

## Formalities associated with your LDRD Project

Before work can begin on your LDRD project two important steps must be taken: your project must be set up in the lab's financial system, and the work planned must undergo an EHS&Q review.

To enter your project in the financial system, you, as LDRD Project Manager, must contact the Budget Analyst in your home Division (Kelly Webster for Accelerator, Susan Brown for Physics, Eden Evans for MEIC-related projects, Annie Ungaro for Engineering, and Tanya Stewart for Theory). They will work with you to complete a project set up request. This step will provide Finance with essential information not included in your project budget submission, such as: a WBS project ID, the Project Name, the Project Abbreviation, which work is billable, whether time can be charged or not, allowed charges such as procurements, the start and end date, and whether any of the funds to be used are for capital equipment. The Budget Analyst will then coordinate completion of the form with Finance. You will be notified by the Budget Analyst when your project has been established in our financial system, permitting signature authorities to be established in the ACM (Account Manager System) at levels requested by you (as the LDRD Project Manager). Work and charging may then commence against the project after the established start date for the project.

It is also required that a "Project Data Sheet" be completed for the project. This is a formality for DOE, and is basically a somewhat formalized version of your budget together with brief explanatory text for the project as a whole. Again, your division Budget Analyst can help. The sheets will be submitted to DOE through the CFO's office.

In addition to establishing a formal budget plan, all approved projects must undergo an ESH&Q review to identify risks to worker safety and the environment, associated mitigation strategies, as well as regulatory, DOE, and Jefferson Lab requirements that must be fulfilled. You and your project team must prepare a description of the project summarizing scope, equipment involved, materials to be used, etc. This description is provided to the ESH&Q liaison of the division of the spokesperson for the project. They will be responsible for distributing it to the relevant subject matter experts, including those outside of ESH&Q (fire protection for example). Comments/questions will be consolidated and provided to you and your project team within 10 working days following the receipt of the project summary. The relevant Division ESH&Q Liaison will then schedule a meeting with the LDRD Program Manager, the project team, and the pertinent ESH&Q staff so that questions can be answered, issues resolved, and any follow-on actions can be developed, scheduled, assigned, and tracked.

Finally, to remind you, LDRD proposals are funded on an annual basis. ***The funds allocated must be spent within the fiscal year and do not roll over to the next fiscal year.*** Further, proposals must compete each successive year for continuation. You will be required to provide a brief mid-year progress report on your project to the LDRD Program Manager by April 30, 2016, which will serve as essential information for the evaluation of your project relative to new proposals received for FY2016 funding. You will also be allowed to submit an addendum summarizing further progress a week prior to the one day FY16 Proposal Summary Review,

which will be held mid-July. You will be asked to make a brief presentation at that review. Finally, you must also provide an Annual Report by October 15, 2016. Details on the format and content of those reports will be provided later.