

**Off-site**

**ORNL Overhead**

**Subtotal**

**3% FAC (Federal Admin.  
Charge)\***

**TOTAL**

\*FAC is the Federal Administrative Charge mandated by Section 3137 of the Strom Thurmond National Defense Authorization Act of 1999 (Public Law 105-261).

**For ORNL Overhead Rates and staff rates, go to link below: (right-click, open hyperlink, select ORNL Rates, Operating Rates). For staff rates select ORNL Rates, Core Category Rates, input badge no.)**

[http://home.ornl.gov/directorates/business\\_information\\_services/planbudget/](http://home.ornl.gov/directorates/business_information_services/planbudget/)

**NOTE: The following are exempt to the 3% FAC charge, please indicate if the sponsor falls under one of these categories:**

- 1) U.S. small business**
- 2) U.S. non-profit organization**
- 3) U.S. institution of higher learning (universities, etc.)**
- 4) U.S. state and local gov'ts.**
- 5) Work that supports R&D, testing, evaluation, or training directly related to counter-terrorism and homeland security activities sponsored by other Federal agencies (applies to proposed work conducted on or after May 1, 2002). You have to have prior approval from DOE to claim this exemption (must have written approval from DOE, i.e., letter, e-mail, etc.).**
- 6) Foreign government**

**TASK 2.**

(etc.)

**MILESTONES/DELIVERABLES**

(The milestones and deliverables should be carefully spelled out. Absolute dates should be avoided; use dates relative to funding acceptance/work authorization by/from DOE. If monthly reports are expected, list them here as deliverables. Be sure that you and the sponsor are in full agreement on them. Group the milestones and deliverables under Tasks if necessary. The overall schedule should be evident from the milestones, which would include one for project completion).

(If required, there can be additional sections inserted here to cover such topics as ES&H concerns, classification concerns, special responsibilities or liabilities of each party, etc.).

**COST ESTIMATE**

(Give an ESTIMATED cost here for each fiscal year's effort. The level of detail should be at the usual "major" items of information (effort, materials, subcontracts, travel, etc.). Additional information may be required by some sponsors).

(In discussion of costs with the sponsor, be sure that you are in agreement as to what cost data will be provided in the monthly reports or other financial summaries).

**COST ESTIMATE** *(example):*

<b><u>DESCRIPTION</u></b>	<b>FISCAL YEAR (FYs if applicable)</b>			<b><u>TOTAL (\$K)</u></b>
	<b><u>2006</u></b>	<b><u>2007</u></b>	<b><u>2008</u></b>	
<b>Staff (x.xx PY)</b>				
<b>Materials (if applicable)</b>				
<b>Travel (if applicable)</b>				
<b>Subcontracts (if applicable):</b>				
<b>On-site</b>				

## Statement of Work

### **TITLE**

(DOE Proposal No. ERD-96-XJxxx)

### **BACKGROUND**

(This section should contain some short, concise information on the sponsor. It should contain background information that is directly pertinent to the work that is being proposed. Prior work for the sponsor in this, or closely related areas, should be mentioned. Brief statements of ORNL special and/or unique capabilities can be given here. If given, they should be concise and directed specifically at the project being proposed. Overall length of this section should normally be ~1/3 of a page).

### **OBJECTIVE**

(This should give “high-level” description of the work to be performed with a concentration on what the sponsor will have obtained at the end of the project. It should be along the lines of the item 5 in the Proposal Information Form (PIF). Excessive technical details should NOT be given here but in the Task descriptions below, if applicable. Length should normally be ~1/3 of a page).

### **SCOPE**

(An overall scope statement as a lead-in to the more detailed Task descriptions is optional here. If present the length should only be a few lines).

**TASK 1.** (Subtitles for each task are optional).

(This should give a detailed description of the task to be performed. It should be explicit enough that this statement could be extracted by the sponsor and used in a tasking statement accompanying a funding document. The description should be more technical than the objective, but still in terms that are readily understood by non-specialized technical personnel within ORNL, DOE, and the sponsor’s organization. Subtasks are permissible. The length can obviously vary, but brevity should be a watchword).

**Task 1.1**

**Task 1.2**

*(Example of Proposal Format)*

**Statement of Work**

**TITLE**

**(DOE Proposal No. ERD-xx-Xxxxx)**  
*(assigned by ORNL WFO Program Office)*

**DATE**

**Prepared by**

**P. Investigator(s)**  
**Division Name(s)**  
**Oak Ridge National Laboratory\***  
**Oak Ridge, Tennessee 37831-6xxx**

**for**

**Sponsor Name**  
**Sponsor Address**

*(use standard contract number reference, note contractor change effective 4/1/2000)*

**\*Managed by UT-Battelle, LLC for the U.S. Department of Energy  
under contract DE-AC05-00OR22725**