INTERNSHIP SUPPORT/STEM EDUCATION SUPPORT/NETL TRAINING SUPPORT SERVICES/AWARDS AND RECOGNITION SUPPORT (FIRM FIXED PRICE)

CLIN 5 ACTIVITY 2

PERFORMANCE WORK STATEMENT

1. PURPOSE

The objective of this Activity is to provide the U.S. Department of Energy's (DOE) National Energy Technology Laboratory (NETL) with support services necessary in the implementation of the Internship Program, STEM Education and Outreach programs, Awards and Recognitions program, and NETL Training Support. The types of services required are broad and require a diverse set of skills and capabilities. The services required are inherently non-governmental.

The support services described in this Performance Work Statement (PWS) are primarily for delivery at NETL's three research sites, Albany, OR; Morgantown, WV; and Pittsburgh, PA, plus the office in Houston, TX. Organizational units from across NETL will utilize the services provided by this contract and may issue Task Orders for services.

The services are to support current NETL systems, technologies, practices, and strategic plans but must be adaptable to changing practices and priorities, evolving technologies, and future systems. Moreover, the services and work products delivered by the contractor must conform to all Departmental and NETL policies, procedures, directives, standards, and other similar requirements, e.g., publications standards.

Finally, the Government seeks a support services contractor that brings with it a flexible and adaptive workforce so that evolving laboratory operations can be matched optimally.

2. SCOPE

2.1. <u>Types of Services</u>

The Contractor shall provide the following types of services under this Activity, all of which fall under the auspices of NETL's Career Management & Education Programs office:

- Internship Program Support
- STEM Education and Outreach Support
- External Awards and Recognition Support
- NETL Training Support

2.2. <u>Resources</u>

The Contractor shall furnish all personnel, facilities, equipment, materials, and supplies necessary to perform the work under this contract, except for that specifically identified as being provided by the Government, which is governed by the clause entitled "Government Property".

3. SERVICE AREAS

The requirements in this performance work statement are grouped under Service Areas. Most services will be provided to NETL's Morgantown, Pittsburgh, and Albany sites. NETL reserves the right to redefine locations for tasks as needed. Career Management & Education Program's Services Areas are as follows:

The contractor shall provide a broad range of administrative support services for Career Management & Education Programs (CMEP). This includes but is not limited to the support of the Internship Programs (IP), STEM Education and Outreach, Training, and External Awards and Recognition for all NETL employees across the three NETL sites (Albany, Morgantown, and Pittsburgh). The contractor shall work within the NETL corporate structure and adhere to programmatic mandates for the development of work products. The contractor shall communicate and coordinate with organizational elements at NETL and other contractors as needed in the execution of work assignments. Production of final deliverables may require coordination and integration of services provided under various tasks and across multiple contracts.

3.1 Internship Program Support

A. The contractor shall assist CMEP in implementing, monitoring, and tracking the IPs to ensure they adhere to DOE's, NETL's, the IP's, and various programs' policies, procedures, and processes. The contractor shall provide administrative support services for all IP activities, from posting an educational opportunity to selecting, funding, and onboarding a Research Associate (RA), appointment extensions, guidance during appointments, updates to the RAD, and offboarding. The contractor shall provide customer service, timely interaction and professional correspondence, communication, direction, and coordination with internal and external stakeholders, including mentors, team supervisors, research associates, potential candidates, external program assistants/managers (i.e., ORISE, MLEF-FECM HQ, etc.), Internship Program Coordinator (IPC), etc. Examples of the various administrative support activities include but are not limited to the following:

B. Contractor shall assist, coordinate, and provide guidance on obtaining a Research Associate (RA), including but not limited to:

1. Zintellect (ORISE applicant system): For example, how to obtain a Zintellect account (ORISE), ensuring questions are answered (ORISE) promptly (within 48 hours), etc.
2. Educational Opportunity Announcement process: For example: generating a request in the Organizational Tracking System/Concurrence Tracking & Director's Tracking Modules (OTS/CTS); providing guidance; reviewing for completeness and adherence to policies and procedures; obtaining the proper signatures; ensuring posting, following up.
3. Selection of a participant in Zintellect (ORISE system): For example: Ensuring questions are answered promptly; cost estimates are received from ORISE promptly (within 48 hours); reviewing for accuracy; resolving problems if necessary (within 24 hours).
4. Assisting with interview travel requests if required.
5. Maintaining electronic files.
6. Foreign National (FN) curriculum vitae (CV) review and approval process: For

example: initiating the process with a standard email template to the mentor; obtaining required information from the mentor; ensuring all gaps are explained on the CV, including months and years; follow-up as necessary.

C. Contractor shall assist and coordinate the entire funding process, including but not limited to:

1. Research Associate Selection Request Form and funding package process: For example the contractor shall generate a request using NETL's OTS/CTS within 24 hours of receipt of the Cost Estimate Worksheet and include all necessary funding package documents; follow-up with mentors, team supervisors, budget management specialists, and Budget & Analysis staff, and answer questions as necessary and request updated Cost Estimate Worksheet if required; review package for accuracy and completeness; generate the funding letter (automatically populated with information on the form) within OTS/CTS within 24 hours of receipt; suggest process improvements;

2. Funding letter: For example, the contractor shall route the funding letter and funding package using OTS/CTS for proper approvals and forward it to ORISE for obligation of funds within 24 hours.

3. Providing customer service: For example, the contractor should direct mentors and team supervisors to OTS/CTS to learn the status of their funding package.

4. Maintaining electronic files.

D. Contractor shall coordinate the offer letter and Terms of Appointment (provided by ORISE):

1. Maintaining electronic files.

2. Coordinating the onboarding process within 48 hours of receipt.

E. Contractor shall coordinate as required with the Foreign National Coordinators/Assistants and external program immigration specialists if the participant is not a US Citizen (currently, 22% of participants are foreign nationals, and this number seems to be decreasing) and follow up as necessary to avoid delays in onboarding or appointment interruptions.

F. Contractor shall coordinate the on-boarding process including but not limited to:

1. Coordinating/confirming start date and location.

2. Entering onsite participants into NETL's Personnel Tracking System (PTS) within 24 hours of receipt of the offer letter/confirmed start date.

3. Executing welcome packet within 48 hours of receipt of signed Offer Letter and Terms of Appointment and following up with participant as necessary with appropriate information.

4. Coordinating/communicating with the mentor, team supervisors, and organizations across NETL to ensure the participant has everything needed to start the appointment.

5. Maintaining one spreadsheet/database that includes all onboarding participants and relevant information due to the IPC on the 25th of the month.

6. Coordinating/communicating with ORISE/MLEF regarding inbound travel or relocation, answering mentors' and participants' questions, or including the

proper point of contact.

7. Coordinating/communicating orientation agenda and scheduling first-day onboarding activities with all required organizations and IPC, including but not limited to (using NETL F 540.8-16 Non-Federal Employee Orientation as guidance):

   a) All necessary training/information sessions such as Security Awareness, Safety at NETL, Cybersecurity Video & LAN information, Workspace & NETL Property, Official Badging, Places & People to Know, NETL Training including Job Hazard Survey, Library, Joule, Photos, etc.

   b) All necessary forms are completed by the participant and mentor, submitted, and electronically filed as required.

   c) Mentor-participant and if the participant is a foreign national, host-participant meeting time (using Microsoft Outlook's calendar/meeting functions).

   d) Input participant information into the Research Associate Dashboard (RAD) and maintain strict accuracy throughout the appointment.

G. Contractor shall provide communication and support throughout the term of the appointment with activities such as but not limited to:

   1. Maintaining strict accuracy of all information included in the Research Associate Dashboard (RAD) and conducting thorough audits of the system at least once a month, including program type, site, building/room, extension number, funded to date, appointment end, CIDs, mentor, email address, notes section, team supervisor, etc., including the revision date in the Notes section for each participant indicating the date the information was last updated;

   2. Coordinating and processing appointment extensions and maintaining funding status: The contractor shall communicate with the mentor and team supervisor, coordinate the appropriate action required, and follow up on funding warnings (RAD automatically sends funding expiration emails at the 120-day, 90-day, 60-day, and 30-day marks) to ensure appointments are not interrupted or terminated; the contractor shall maintain electronic copies of correspondence and necessary forms/paperwork.

   3. Coordinating and assisting with FN requirements/expiration: The contractor shall communicate with the mentor, team supervisor, and internal and external foreign national assistants/coordinators, coordinate the appropriate action required, and follow up on funding warnings (RAD automatically sends funding expiration emails at the 120-day, 90-day and 60-day marks) to ensure appointments are not interrupted or terminated; the contractor shall maintain electronic copies of correspondence and necessary forms/paperwork; the contractor shall create and maintain a comprehensive and accurate spreadsheet and files indicating export control approval phases; etc.

   4. Alerting IPC of any problems or issues before escalation or appointment interruption.

H. Contractor shall provide guidance/direction and support the RA travel processes and procedures with activities such as but not limited to:

   1. Providing timely correspondence guidance and answering mentors' and participants' questions regarding the travel processes following all established

procedures and guidelines, coordinating with ORISE as necessary, within 24 hours of receipt.

2. Maintaining clear and easy-to-follow travel guidance and applicable forms available on IP's SharePoint and EDX (NETL's Coordination & Collaboration Tool) sites, as well as the handbooks (requires IPC review and approval); and developing and presenting process improvements to the IPC.
3. Reviewing Travel Authorization Requests (TAR) for accuracy, completeness, adherence to travel regulations and policies, resolving any issues, and providing to IPC via shared drive folder for approval.
4. Submitting completed Travel Authorization Requests to ORISE or the appropriate external program manager and maintaining electronic copy via email.
5. Emailing RAs and mentors travel guidance reminders quarterly and when any updates/changes occur.

I. Contractor shall administer and process Faculty Stipend Requests, including activities such as but not limited to:

1. Emailing faculty participants and mentors using ORISEFacultyStipends@netl.doe.gov with the most recent version of the Faculty Stipend Request Form attached, reminding them of the due date and procedure; follow-up emails may be required.
2. Reviewing the forms for completeness; maintaining a spreadsheet indicating if a Stipend Request Form has been received for the month, if zero hours/days have been reported, or if nothing is received; reaching out to RAs, Mentors, and Team Supervisors every quarter reporting who has not submitted forms.
3. Maintaining electronic files and placing completed forms in a shared folder no later than the 10th of every month for the IPC review and signature.
4. Emailing completed Faculty Stipend Request forms with hours/days reported to ORISE no later than the 15th of every month (requests with zero hours are not forwarded.
5. Keeping the IPC, mentors, and team supervisors updated quarterly regarding which faculty participants have not submitted Stipend Request Forms.

J. Contractor shall provide guidance, customer service, communication, direction, etc. (within 24 hours of receipt) to mentors, team supervisors, participants, and internal and external stakeholders regarding IP policies, procedures, and processes, including but not limited to days away process/procedure, schedule, taxability, verification of participation, telecommute/remote access, off-site justification, etc. and maintain electronic files.

K. Contractor shall coordinate and process appointment/funding extensions, including activities such as but not limited to:

- Obtaining a new cost estimate from ORISE and processing using the necessary forms; updating the RAD; maintaining electronic files; avoiding termination/interruption of appointments within 24 hours of receipt of mentor or team supervisor request.

L. Contractor shall coordinate and process termination of appointments, including such activities as but not limited to:

1. Coordinating off-boarding process, including Research Associate Out-Processing Checklist; informing internal and external stakeholders via email within 24 hours of receipt of notice of a participant's appointment termination date.
2. Initiating and coordinating the off-boarding process per DOE, NETL, and IP policies and procedures with the RA, mentor, team supervisor, and IPC.
3. Updating the Research Associate Dashboard with all necessary information within 24 hours of notification of the last day.

M. Contractor shall coordinate and process redirection/de-obligation of funds as directed by NETL's Budget & Analysis directorate and directorate's Business Management Specialist and coordinate with external stakeholders per guidelines and regulations.

N. Contractor shall ensure external stakeholders coordinate outbound travel with the RA and assist the RA with the process.

O. Contractor shall coordinate all aspects of the ~10-week duration summer programs (for example, but not limited to: Mickey Leland Energy Fellowship—MLEF) at all three sites (approximately 45), including such activities as but not limited to:

1. Creating and maintaining electronic files and information spreadsheets on the shared drive and PTS and RAD.
2. Monitoring and coordinating the summer internship electronic mailboxes.
3. Coordinating and tracking the project identification process, including reviewing forms for completeness, and ensuring all approvals are received and sent to HQ (November-January timeframe).
4. Coordinating Mentor Orientation conducted by HQ (January timeframe).
5. Communicating and coordinating continuously throughout the program duration from on-boarding to off-boarding with appropriate internal organizations/stakeholders across NETL such as IT/InfoDesk, ESS&H, Property, Library, Joule, Training, Security, Multimedia (including video/photographers), Facility Operations, Communications and Public Affairs, mentors, team supervisors, lab responsible persons, Analytical Lab personnel, participants, etc.; Creating and maintaining summer internship program SharePoint sites.
6. Developing and coordinating all aspects of summer programs orientation, including a welcome letter, orientation packet (due to IPC ~April timeframe), all forms and information sheets, multimedia/communication plans, etc.
7. Coordinating and tracking the selection process, including reviewing forms for accuracy/consistency and completeness, and ensuring all approvals are received and sent to HQ.
8. Coordinate and ensure all resources, equipment, supplies, etc. required to complete summer research projects are available at appointment start (including but not limited to computer equipment, telephones, office supplies, required resources, software/White List programs, lab coats, PPE requests, etc.) this includes inputting and updating as necessary in PTS and RAD;
9. Coordinate with HQ and NETL's tour team all details of site tours of Pittsburgh and Morgantown sites with HQ, Pittsburgh, Morgantown summer participants, and IPC.

10. Assist and coordinate enhancement activities as directed by the IPC, such as pizza parties, brown bag lunches, potlucks, orientation breakfast, weekly tag-up meetings, tours, virtual events, etc.
11. Assist with MLEF Technical Forum as needed (HQ event).
12. Communicate and coordinate updates to the internal SharePoint site, external internship program site, and handbooks.
13. Create and present process improvements to IPC.

P. Contractor shall assist with keeping all information on the IP SharePoint and Energy Data eXchange (EDX) sites (or other necessary sites) updated and relevant, alerting the IPC when changes need to be made.

Q. Contractor shall monitor the electronic mailboxes, such as the Internship.Program@netl.doe.gov mailbox, daily and take appropriate action as required within 48 hours of receipt (unless otherwise noted above); the contractor shall notify the IPC if questions or issues require her attention.

R. Contractor shall maintain an electronic filing system for Graduate Education Programs shared folder, including but not limited to the above-referenced specific items, as well as the ORISE Reporting Requirements per ORISE Technical Direction (approximately eight monthly; 6 quarterly; 1 bi-annually; and six annually); in addition, the contractor shall also email deliverables to the specified point of contacts.

S. Contractor shall develop and maintain a complete set of Standard Operating Procedures (including summer programs), which should be updated as a deliverable every quarter; should include easy-to-follow step-by-step accurate and complete instructions.

T. Contractor shall propose program process improvements to the IPC for review and assist the IPC with enrichment activities for RAs.

U. Administrative Support Specialists will be provided established IP guidelines for mentors and participants, as well as DOE and NETL procedures, orders, forms, etc. and should adhere as required. The contractor shall assist the IPC with maintaining up-to-date guidelines. The contractor shall alert the IPC of any possible issues as early as possible to help eliminate escalation. The contractor shall consult with the IPC when in doubt.

Schedule / Deliverables:

Internship Program Deliverables	Due Date
Educational Outreach Support Implementation Plan	As Requested,
Support for Web-Based Mentor Tools and Information	As Requested,
Export Control Approval Phases Spreadsheet for RAs	On-going & Monthly
Creation & Updating Forms/Templates	As Needed
Required Training Accountability	As Needed
Audit Research Associate Dashboard (RAD) (correcting any inconsistencies)	Weekly: Wednesdays
Monitor Research Associate Travel E-Mailbox	Daily
Monitor Internship Program E-Mailbox	Daily
Monitor Summer Internship Programs E-Mailbox	Daily
Undeliverable Email Address Review	Daily: As Needed
Weekly Tag-Up Meetings with IPC	Weekly: Mondays

Weekly Tag-Up Meetings with IPC for Summer Programs	Weekly (2x Weekly as needed)
COVID-19 Email Reporting	Weekly: Fridays
RA Accountability Drill Tracking, Reporting, Communication, Follow-up	Weekly & As Needed for DOE Drills
Coordination of Summer Programs: Includes Call for Mentors, Project Identification Forms, Spreadsheet Updates, Selections of Students, Media/Communication Plans, Videos, Photos, Technical Forum; Update SharePoint Sites;	November through August
Onboarding Participants Spreadsheet (including RA's name, mentor, site, location, FN status, etc.)	Monthly: 25th of Each Month
Reconcile PTS & RAD	Monthly: 1st Friday of Each Month
EDX Site Updates & POC	Monthly: 20th -- 31st of the Month
Process Faculty Stipend Requests & Status Report by Year (including RAs' and mentor's names, months, requests received, zero hours/days reported or if nothing is received)	Monthly: 13th of Each Month
NETL IP Forms Review	Bi-Monthly: February, April, June, August, October, December 1st -10th of the Month
Personnel Tracking System (PTS): Serve as Charter Member, Process Improvements Team; User Acceptance Test Group	As Needed & Quarterly
Monitor/Update SharePoint Sites & External Websites	Quarterly: January, April, July, October 5-10th of the Month
NETL Organization Chart Reconciliation with RAD & PTS	Quarterly: January, April, July, October and As Chart is Updated
OTS/CTS Turnaround Time Report	Quarterly: January, April, July, October 25th – 30th of the Month
Welcome Packet & Logistical Information Review & Update	Quarterly: March, June, September, December
Review & Suggest Changes for Mentor Handbook & Research Associate Handbook	Quarterly: March, June, September, December 10th-20th of the Month
Quarterly Computerized Accident/Incident Reporting System (CAIRS) Reports for ES&H	Quarterly: March, June, September, December
Extensive Audit Research Associate Dashboard (RAD) (correcting any inconsistencies)	Quarterly: January, April, July, October 15th of the Month
Reconcile PDAT Report with Travel Authorization Requests	Quarterly
Standard Operating Procedures (includes summer programs)	Quarterly: March, June, September, December
ORISE Technical Direction Reporting Requirements (track, electronically file, and forward to all specified point of contacts if required)	As Specified (approximately 8 monthly, 6 quarterly, 1 bi-annually, and 6 annually)
Plan for Summer Programs: Including Communications/Media Plan, Upcoming Meetings, etc.	Yearly: April 10th
Update Stipend Rates	Yearly: November
Photos of RAs Cultural Exchange for State Department for	Gather Throughout Year

ORISE	

3.2 STEM Education & Outreach Program Support

The Contractor shall provide STEM education and outreach support services to NETL, including the Albany, Morgantown, and Pittsburgh sites. The Contractor shall work within the NETL corporate structure and adhere to programmatic mandates for the development of work products. The Contractor shall communicate and coordinate with organizational elements at NETL and other contractors as needed in the execution of work assignments. Production of final deliverables may require coordination and integration of services provided under various tasks and across multiple contracts.

The Contractor's support shall include, but not necessarily be limited to the following

A. Support the NETL Science Bowls. Contractor shall support the preparation, execution, and post-event activities of NETL's Annual Science Bowl Competitions. The Contractor will support all necessary on- and off-site in-person and/or virtual activities required for the science bowl sponsored by NETL in preparation for, execution of, and following the West Virginia (WV) and Western Pennsylvania (WPA) Regional Science Bowl competitions to include: team and volunteer recruitment and registration to maximize participation/involvement, advertising, supporting WV RESA competitions, coordinating and conducting sponsorship activities (where applicable), organizing and distributing competition questions, scheduling and conducting volunteer training, creating and facilitating Zoom room schedule if virtual, proposing competition t-shirt slogans and themes, proposing team prizes, creating competition schedules, recording minutes/notes at scheduled meetings, attending all NSB coordinator's meetings, identifying and recommending catering services as necessary, coordinating communications with event participants and venues, engaging in event set-up and tear-down, purchasing, facilitating the inspection of all buzzer systems, coordinating and requesting all multimedia products, modifying and maintaining content for and keeping current the WV and WPA Science Bowl websites, responding to participant enquiries, administering post event surveys and collecting, and organizing, collecting and reporting data/statistics, and coordinating and conducting mailings,

B. Monitor STEM Education & Outreach E-Mail Account – The contractor will intake, track, and bring to Activity COR's attention and/or address (as necessary) requests from STEM Education & Outreach email account and place on calendar.

C. Support and Assist Coordination of ad hoc internal/on-Site, external/Off-Site, and virtual STEM Ambassador & Other STEM events and activities in an administration support capacity.

D. Collect and maintain STEM Education and Outreach Data/Statistics – The contractor will seek, collect, and record appropriate qualitative and quantitative program data and maintain up-to-date spreadsheet(s) summarizing the various STEM education & outreach activities.

E. Support and assist coordination of Bring Your Child to Work Day, Earth Day Poster Contest, and similar events with required logistics, administrative support, and hands-on activities.

F. Support and assist in occasional NETL educational tours – The contractor will support and assist in all NETL Tour functions at the Albany, Morgantown, and Pittsburgh

sites including intaking requests, communicating with requesters, scheduling tours, chaperoning tours (as necessary), completing all necessary pre- and post-event paperwork including rosters, permission forms, foreign national processing, etc.

Schedule / Deliverables:

STEM Education & Outreach Program Deliverables	**Due Date**
WPA & WV Science Bowl Team Planning	Summer into Fall
WV RESA Science Bowl Planning	Summer into Fall
Science Bowl Team Recruitment & Registration	First Quarter (Oct. - Dec.) and as Requested
Science Bowl Volunteer Recruitment & Registration	First & Second Quarters (Oct. - Feb.) and as Requested
Coordinating and soliciting WPA and WV Science Bowl Sponsorship where applicable	First & Second Quarters (Oct. - Feb.) and as Requested
Science Bowl Advertising	First & Second Quarters (Oct. - Feb.) and as Requested
Science Bowl Scheduling/Conducting Volunteer Training	Second Quarter (Jan. – Feb.) and as Needed
Propose Science Bowl T-Shirt Slogans, Themes, & Team Prizes	Third & Fourth Quarter (May – Aug.)
Create Science Bowl Competition Schedules	First Quarter (Oct. – Dec.)
Attend Science Bowl Meeting & Recording Notes	At & Following Scheduled Meetings
Science Bowl Catering Review & Recommendation	Third & Fourth Quarter (May – Aug.)
Facilitate the Inspection of Science Bowl Buzzer Systems	First & Second Quarters (Oct. - Feb.) and as Requested
Coordinate & Request Science Bowl Multi-Media Products	First & Second Quarters (Oct. - Feb.) and as Requested
Administer Science Bowl Post Event Surveys & Collect, Organize, & Report Data/Statistics	Immediately Following Events
Maintain & Update Websites for WV and WPA Science Bowls	Review & Update as Needed/Requested

Monitor STEM Education & Outreach E-Mail Account	Daily
Support & Assist Coordination of Internal/On-Site, External/Off-Site, & Virtual STEM Ambassador Activities	As Needed
Collect & Maintain STEM Education & Outreach Data/Statistics & Provide Fiscal Year Report to DOE HQ as Required	Directly Following Each Event, at Year's End, or as Needed
Support & Assist Coordination of NETL Bring Your Kids to Work Day, Earth Day Poster Contest, and Similar Events	As Needed
Support & Assist in the NETL Tour Program	As Needed

3.3 External Awards & Recognition Programs Support:

The contractor shall assist with implementation of the External Awards and Recognition Programs including, but is not limited to:

A. Prepare award opportunity notices to inform NETL workforce of external award opportunities.

B. Collaborate with TechWriting and NETL Communications Team to plan and develop NETL Communications Plan to announce opportunities on NETL's intranet, through email, and other methods of communication.

C. Collect all nominations and work with NETL federal point of contact to conduct an initial review of nomination content for accuracy, relevance to award nomination criteria, and completeness.

D. Communicate nominees to NETL management for decisions on which nominees to move forward with.

E. Work with the Technical Writing Team to ensure the award nomination is written and meets the external awards requirements. Contractor shall gather information on potential nominees and coordinate with the Technical Writing Team to develop the nomination package.

F. Send award nominations to NETL managers for approval.

G. Submit nominations as well as track and manage all active nominations; upon notification of an award, work with the Technical Writing Team to promote the award wins.

H. Maintain the master awards database.

I. Maintain content for the myPortal and NETL external webpage awards pages.

Awards & Recognition Program Deliverables	Due Date
Weekly Awards Summary report	Weekly
Final comprehensive tracking document of award	Yearly – December 1

nominations and awards won/lost with high-level summary documenting awards received.	

3.4 NETL Training Support

The Contractor shall assist NETL in implementing and administering a training program which provides general, as well as job-specific, training to all NETL employees (i.e., federal and contractor). This training portfolio includes, but is not limited to:

- Environment, safety, and health
- Security
- Cybersecurity
- Equal Employment Opportunity (EEO)
- Project Management
- Information Technology
- Research and Development
- Other mission-related training to include business and administration identified by the Activity Contracting Officer's Representative (Activity COR).

Other site support contracts at NETL often include training elements related to emergency response and laboratory safety. The Contractor shall coordinate and communicate among these organizational elements as well as with DOE headquarters. To ensure consistency of the Laboratory's training requirements, the Contractor shall ensure work products are compatible with NETL standards and work practices as well as the Departmental training platform(s) through which they will be delivered and tracked. The Contractor shall be responsible for tracking mandatory institutional training for all NETL employees (i.e., federal and contractors) and reporting delinquencies to the Activity COR.

A. The Contractor shall provide business administrative support to include maintenance of a repository of training materials, records of training attendance, and related tracking and reporting. The Contractor shall support the enhancement of current training database(s), administer the training database(s), and perform record keeping as required by NETL and DOE Directives. Support shall include the following activities:

    1. Catalog and maintain training materials, including graphics, images, and photos used as part of training material, on an NETL-approved system.

    2. Track and report training completions for each employee as well as recurrence reminders. The Contractor shall ensure that employees are notified of the need to repeat training or participate in refresher training as expiration dates on the training approach (at least 30 days in advance) if the employees' duties have remained the same. Delinquencies shall be reported to the Activity COR.

    3. Administer training system database(s) used to track training for NETL Contractor employees. The administrative role will include maintenance of user account data and training history, update of curriculums and assignment of courses, and participation in system upgrades, configuration changes, and testing.

4. Provide or coordinate training reports as requested by the Research and Innovation Center (RIC) training Subject Matter Expert (SME), Training Officer, or ESS&H Division(s) or other stakeholder(s) and approved by the Activity COR.
5. Recommend training support improvements, as needed, to include managing the results of job hazards surveys on which training needs are based.
6. Support SMEs by alerting training recipients that they have been assigned training by their supervisor or a subject matter expert, or because of a hazards or job survey, or because of a change in status. This notification can be done by email.
7. Provide support to NETL employees who need assistance with assigned/desired training assignments and personal training records.
8. Assist NETL employees and Contractors who do not have LAN accounts but require access to required training materials and ensure successful completions are recorded.
9. Create new courses within the DOE Learning Management System as required by DOE/NETL Directives or as requested by SME and as approved by the Activity COR
10. Coordinate and provide support to NETL federal and contractor employees in the creation of new course enrollments, rosters, email notifications and further enrollment administration within the DOE learning management system

B. The Contractor might be asked to provide training instruction and related logistical support for assigned online and classroom training events. The Contractor may present training to target audiences, which would include NETL federal and contractor employees. Support might include:

1. Presenting seminar and/or lecture-based training courses to audiences of varying size and experience. This may be performed independently or in coordination with SMEs.
2. Providing training or coaching to SMEs who will train other employees (train the trainer).
3. Ensuring resources are available at targeted classroom locations to include room reservation, equipment, training materials, scheduling, tele-video links, sign-up sheets, etc. for both internal and vendor-led training events

C. The Contractor may provide occasional training course development for limited modules based on content provided by a subject matter expert:

1. The Contractor may provide occasional training modules for delivery through web-based environments. The contractor may work with SMEs, to transfer the SME's content to a training module.
2. The Contractor may update existing modules including preparation and conversion of material to be presented through other platforms and learning management systems.

D. The Contractor may develop training announcements and notify, when necessary, identified participants that a course is ready for access, the deadline for completion, and any other pertinent information for successful completion and recording. The Contractor may ensure that the content of the training modules is approved by the SMEs and Activity COR before the training module is updated or deployed.

E. The Contractor may occasionally serve as moderators of NETL-sponsored virtual employee training events:

- The Contractor may work with the Activity COR and assigned vendor to setup planned moderation for virtual events, as needed. Moderation may include being present during the training to facilitate Q&As sessions and assist with operation of NETL-sponsored, platforms.

Schedule / Deliverables:

A. Deliverables include maintenance and administrative support to the extent described above for the courses and materials described below. The schedule is based on historical precedence but may change from year to year. The Contractor should assume that at least one make-up session for each training course that relies on classroom delivery will be scheduled if attendance was not 100% of those who require the training.

B. The Contractor is responsible for transferring the records of completion to Safety Training electronic Management System (STeMS) for RIC's recordkeeping.

C. The Contractor is responsible for maintaining record of the next review of the directive or manual on which training is based. The Contractor should be prepared to share this information with the Activity COR or SME, if requested.

D. Weekly report which describes the preceding week's accomplishments and activities, and immediate notice of requests for new CBTs or training products.

E. Computer-based training modules, lectures, or materials based on the table of historical training identified in Attachment A.

F. Rosters, evaluations, and attendance records for internal trainings requested through the Learning Nucleus System.

G. Training records, as requested

H. The Contractor should plan for being asked for training records and training data one – five times per week. These requests may range from single employee training records to large population data requests used in the STeMS database (as an example)

I. Classroom lecture, as indicated in the table in Attachment A. The Contractor should anticipate performing at least one classroom lecture per year.

Table of Historical Training

NETL Training Support

Learning Nucleus/OLC – DOE platforms for offering computer-based training, which controls access to the training and records employee completion

Course Title	Course Code	Frequency (Years)	Next Date Offered	Delivery Method	Audience
Access Authorization Briefing	NETL-1007 (TMS221)	1	Jul-16	OLC or Equiv	Employees who hold security clearances
AIIS (reference CAR/PAR)	EOS426	3	--	ILT	Users of the corrective/preventive action system
Asbestos Awareness	NETL-EMO122	Once or as needed	--	ILT	Employees who may encounter asbestos-containing materials
Automatic External Defibrillator (AED)	NETL-EMS440	2	--	ILT/ Practice	Medical staff, confined space personnel, ERO members, chief fire wardens, janitorial supervisors
Bloodborne Pathogens (BBP)	NETL-1001v2 (EMS313)	1	Jan-16	OLC or Equiv	ERO, security, janitors, laser users
Comprehensive Security Briefing	NETL-TMS110	Once or as needed	--	CBT	Employees with new security clearances
Compressed Gas– Handling and Use	NETL-1017 (NETL-EMS203)	3	Mar-17	OLC or Equiv	Users, facility custodians and supervisors
Confined Space Entry	NETL-EMS212 NETL-EMS213	1	Oct-16	OLC or Equiv	Entry supervisors, entrants, and attendants; security, facility custodians, ERO, and ES&H Reps
Confined Space Rescue	NETL-EMS214	1	Mar-17	ILT/ Practice	Entry supervisors, entrants, and attendants; security, facility custodians, ERO, and ES&H reps
Continuity of Operations Awareness	2015_COOP (EMO402)	1	Aug-16	OLC or Equiv	All federal employees and **select** Contractors

Course Title	Course Code	Frequency (Years)	Next Date Offered	Delivery Method	Audience
COR (ES&H Primer)	NETL-EMS502	As appointed, as needed	--	OLC or Equiv	DOE CORs and line managers
Cost Accrual	NETL-1010	Once or as needed	--	OLC or Equiv	Program officials, CORs, contract specialists and their proxies
CPR	NETL-EMS318 NETL-EMS319	2	--	ILT/ Practice/ OLC Quiz	Medical staff, confined space personnel, ERO members, chief fire wardens, janitorial supervisors
Cryogenic Safety	esh_sah_a04_sh_enus	Once or as needed	--	OLC or Equiv	Handlers of cryogenic materials
Cyber Security Awareness	2015 DOE Annual CyberSecurity Awareness	1	May-16	OLC or Equiv	All employees (exception is employees without LAN accounts)
Directives (Writing and Revising)	EMS510	Once	--	CBT	Subject matter experts
DOE Counterintelligence	NETL-1014	1	Jan-16	OLC or Equiv	All employees
Electrical Safety - General	NETL-EMS231	As needed	--	ILT	Lab workers (non-electricians or technicians)
Electrical Safety – Qualified Electrical Worker	AMSEL (Rev 7/19/05) (NETL-EMS232)	As needed (new hire, job change, SARS modification)	--	OLC or Equiv	Electricians and technicians
Electrical Safety - Technicians	NETL-EMS233	As needed (new hire, job change, SARS modification)	--	ILT	Equipment operators, maintenance, warehouse personnel
ERO Emergency Vehicle	NETL-ERO550	1	Mar-16	OLC or Equiv	Employees who operate the ERO vehicles
ERO Position–Specific	NETL-EMO400	1	Jul-16	ILT/ Practice	ERO members
Fall Prevention (Ladder Safety)	NETL-EMS430L	2	--	ILT	Workers who use ladders
Federal Energy Management Program (FEMP)	NEW	1	--	New	All employees

Course Title	Course Code	Frequency (Years)	Next Date Offered	Delivery Method	Audience
Fire Prevention/ Extinguisher	NETL-EMS202	1	--	ILT/ Practice	ERO, security, users of hot work permits
Fire Warden	NETL-EMO413 NETL-EMO414	As appointed, as needed	--	ILT/ Quiz	Fire wardens
First Aid	NETL-EMO419 NETL-EMO410	3	--	ILT/ Practice/ Quiz	Medical staff, confined space personnel, ERO members, chief fire wardens, janitorial supervisors
Foreign National Hosting	NETL-1013	1	Apr-16	OLC or Equiv	All employees (exceptions are cafeteria, day care, janitorial, and grounds personnel)
Forklift (see Powered Industrial Trucks)					
General Employee Emergency Response Training (GEERT)	NETL-1009 (EMO411)	1	Nov-16	OLC or Equiv	All employees
Globally Harmonized System–OSHA Labeling of Containers	NETL-1015	Once	--	OLC or Equiv	All employees
Hazard Communication	NETL-EMS301	1	Oct-14	OLC or Equiv	All employees
HazMat/Rescue	NETL-EMO415	1	--	ILT/ Practice	HazMat/rescue team members
HazWaste for Handlers	NETL-EMS102	1	--	ILT/ Practice	Workers who handle hazardous waste
HazWaste/RCRA	NETL-1018	1	--	ILT	Workers who handle hazardous waste as identified by the job hazard survey
HAZWOPER	NETL-EMO405	1	--	ILT/ Practice	HazMat technicians
HAZWOPER Refresher	NETL-EMO406	1	--	ILT/ Practice	HazMat technicians
Hearing Conservation	NETL-EMS309	1	Mar-16	OLC or Equiv	Workers in high-noise areas (> 85dB)

Course Title	Course Code	Frequency (Years)	Next Date Offered	Delivery Method	Audience
Hoisting, Rigging, and Cranes	NETL-EMS219	3	--	ILT/ Practice	Hoisting and rigging operators
Initial Security Briefing	NETL-TMS100	Once	--	Administered by Security	Pre-badged new hires
Insider Threat Awareness (Defense Security Service)	DSS_ITT_2015	1	Oct-16	OLC or Equiv	Employees who hold security clearances
ISO 14001/OHSAS 18001	NETL-1008	1	Apr-16	OLC or Equiv	All employees
Laboratory Safety–General (non-ORD)	NETL-EMS207	3	--	ILT	Lab workers
Laboratory Safety–ORD Includes Working from Elevated Heights (Fall Prevention), Safe Lifting, PPE, Hearing Conservation, Hazard Communication, Fire Safety Extinguisher, Chemical Hygiene, Detailed HazCom, Electrical Safety, and Compressed Gas	EMS207	3	--	ILT	Lab workers
Laser Safety Awareness	NETL-EMS206	As needed (new hire, job change, SARS modification)	--	OLC or Equiv	All employees
Laser Operator Safety	NETL-EMS207	As needed (new hire, job change, SARS modification)	--	HS5200-W CBT from LANL by led SME	Operators of Class 2, 3a, 3b or 4 lasers
Lead Awareness	NETL-EMO123	Once or as needed	--	ILT	Employees who may encounter lead-containing materials

Course Title	Course Code	Frequency (Years)	Next Date Offered	Delivery Method	Audience
Lockout/Tagout	NETL-EMS200 NETL-EMS201	As needed (new hire, job change, SARS modification)	--	ILT/ Practice/ OLC quiz	Those who perform LOTO
Lockout/Tagout Refresher	NETL-EMS200	As needed (new hire, job change, SARS modification)	--	ILT	Those who perform LOTO and have completed initial LOTO training
New Hire Safety Orientation	NETL-EMS234	Once	--	ILT	All employees
Nonhazardous Waste	NETL-1012	2	Mar-17	OLC or Equiv	All employees
OPSEC Briefing– Protective Measures (Photography of NETL Facilities)	NETL-1002v2	1	Nov-16	OLC or Equiv	All employees
Payloader and Heavy Equipment	NETL-EMS216	3	--	ILT/ Practice	Operators (need medical clearance)
Personal Protective Equipment (PPE)	NETL-EMS317	As needed (new hire, job change, SARS modification)	May-16	OLC or Equiv	Those identified by JHS/SARS/AHA
Powered Industrial Trucks (Forklifts)	NETL-EMS215	3	--	ILT/ Practice	Forklift operators
Privacy Awareness	2015_PAC_AICC	1	Aug-16	OLC or Equiv	All employees
Property Protection Management	NETL-1006 (TMS600)	1	Apr-16	OLC or Equiv	All employees
Purchase Card Use	NETL-1019	1	Jul-16	OLC or Equiv	Purchase card holders
Radiological Worker	NETL-EMS601	2	Ongoing	ILT	Workers who use radiological equipment as identified by job hazard survey
RCRA Hazardous Waste Satellite Accumulation Area	NETL-1018 (EMS112)	As needed (new hire, job change, SARS modification)	--	OLC or Equiv	Users of SAAs

Course Title	Course Code	Frequency (Years)	Next Date Offered	Delivery Method	Audience
Records Management Introduction	EMS700	2	Oct-17	OLC or Equiv	All employees
Respiratory Protection	NETL-1016v2 (EMS308)	1	Mar-17	OLC or Equiv	Employees in respiratory program
Safe Lifting	NETL-EOO419	As needed (new hire, job change, SARS modification)	--	ILT	Material handlers
Security Refresher	NETL-1002 (TMS400)	1	Feb-16	OLC or Equiv	All employees
Self–Contained Breathing Apparatus (SCBA) - Use and Care	NETL-EMS420	1	--	ILT/ Practice	ERO members
Vehicle Safety and On-site Parking		3		OLC or Equiv	All employees
Welding/Hotwork	NETL-EMS217	3	--	ILT/ Practice	Those identified by the job hazard survey
Working from Elevated Heights (formerly Fall Protection/ Prevention)	NETL-EMS430	2	--	ILT	Workers who work 6 feet above ground

Mandatory for all employees

(SAMPLE)Weekly Report

NETL Training Support

Contractor Activity Coordinator: (*Enter Name*)
DOE Activity COR: Cindy Smith
Weekly Report for Week Ending: June 3, 2021

NETL Items of Internal Interest

(FE) General Administrative Support. Fielded incoming email messages and telephone calls for logon issues and general troubleshooting errors (popup blockers, java script, etc.). Currently, there are 14 mandatory OLC training deliverables (Privacy Awareness, DOE Annual Cybersecurity Awareness, Continuity of Operations Awareness, Security Refresher, Property Protection Management, ISO 14001/OHSAS 18001, General Employee Emergency Response Training, Records Management, Nonhazardous Waste, Foreign National Hosting, DOE Counterintelligence, Globally Harmonized System, Photography of NETL Facilities, and Laser Awareness) assigned to new employees. (Tim Nagy/Sue Willard/Bethany Swauger, 304-285-4187, SD-01)

(FE) New Employees/Terminations. Sent the ESS&H Training Team Welcome email to 6 new employees and archived CBT records for 4 employee terminations. (Responsible POC, Phone Number)

(FE) Training Recorded. Received and entered training participation sheets for the following:

- NETL-TMS100 Initial Security Briefing
- NETL-EMS430L Ladder Safety
- NETL-ERO250 National Incident Management System (NIMS)
- NETL-ERO210 NETL ERO Incident Command System 100
- NETL-ERO220 NETL ERO Incident Command System 200
- NETL-EMS234 New Hire Safety Orientation
- NETL-EMS270 Specialized Non-Safety Awareness – STRIPES 7.2 Upgrade
- NETL-EMS230 Specialized Safety Awareness – Metallography Waste Management
- NETL-EMO419 Working in Hot Weather

(Responsible POC, Phone Number)

(FE) OLC Administration – Account Maintenance.

- Reset 2 passwords and unlocked 2 accounts.
- Updated supervisor field for 10 employees per request of Lee Carnahan.

(Responsible POC, Phone Number)

(FE) PTS Records Management. Prepared New Employee, Expiration Date Extension, and Termination records to be filed by NETL Records Management. (Responsible POC, Phone Number)

(FE) OLC Administration – Reports Requested.

- Ran report for NETL- EMS234 New Hire Safety Orientation training for PGH employees who need the training per request of Leslie Franczyk. Sent report to requestor.
- Ran report for NETL- EMS234 New Hire Safety Orientation training for MGN employees who need the training per request of Danny Bellay. Sent report to requestor.
- Ran report for NETL- EMS234 New Hire Safety Orientation training for ALB employees who need the training per request of Bruce D. Brown. Sent report to requestor.

(Responsible POC, Phone Number)

(FE) Cyber Security Quarterly Request. Received a request from ITOMS (Jeff Schlosser, CS-01) to provide data for the Federal Information Security Management Act (FISMA) report regarding Cyber Security training. The report asked how many employees completed Cyber Security training since August 1, 2015 (129), number of new users (31), and number of new users who satisfactorily completed Cyber Security training within the organizationally defined time limit (18 of 31). Provided initial report on June 2 and asked for feedback as 1 employee doesn't have a LAN account, 2 employees were Contractor employees and transferred to DOE, and 10 were not assigned the training as new training was going to replace the 2015 version, but the course was put on hold by the subject matter expert (Eric Fairbanks). (Responsible POC, Phone Number)

(FE) OLC Administration Summary. Checked status of account for 17 employees, reset 2 passwords, unlocked 2 accounts, modified records of 6 employees, terminated 1 employee; checked status of course completion for 13 employees, added 4 courses, deleted 3 courses, and manually pushed through 1 course in OLC. (Responsible POC, Phone Number)

(FE) Lockout/Tagout Training. Instructor (URS, Matt Menas) trained 2 employees who needed LOTO training. The others on the list are researchers and instructor are going to review needs. Will schedule additional sessions as required. (Responsible POC, Phone Number)

(FE) Confined Space Entry Training. Sent an email on May 18 to 23 Contractor employees who were not assigned the CBT module of Confined Space Entry training when the course was released and/or needed to be assigned the course based on their job hazard survey selections. One employee no longer requires this training; of the remaining 22 employees, 10 employees completed this training and 12 have not as of June 3. (Responsible POC, Phone Number)

(FE) Phishing (Cybersecurity) Training. Still waiting to get confirmation to release existing Phishing training module in OLC. Discussed with lead SME (Eric Fairbanks) his concern that the DISA training module (now available in OLC) does not properly indicate that the user is completed with the training on they are at the last screen. Other than replicate the training internally, unable to fix this issue. Plan is to emphasize this glitch when making the course announcement. Anticipate training to be assigned to all employees with LAN accounts. (Responsible POC, Phone Number)

(FE) Project List Update. Updated task list in SharePoint at the request of SDSE PM. (Responsible POC, Phone Number)

(FE) EEO Complaints Processing for Non-Federal Employees Training. Awaiting final approval from SME (Alice Mercer). (Responsible POC, Phone Number)

(FE) ISO-14001/OHSAS-18001 Training. Waiting on second update review from SME (Janice Bell – ESS&H). (Responsible POC, Phone Number)

(FE) GEERT 2016 Training. SME (Jerry Simkonis – ESS&H) approved, to A Lichvar for approval. (Responsible POC, Phone Number)

(FE) Hazard Communication Training. Received approval from SME (Michael Kay – ESS&H). SME to forward to Dave Hyman for review. (Responsible POC, Phone Number)

(FE) Annual Security Refresher Training. Assigned to all NETL employees (1,572) and IG employees at NETL sites (21) with OLC accounts. (Responsible POC, Phone Number)

(FE) Counterintelligence Training. Created 2016 Learning Item in OLC, tested, and assigned to all NETL employees (1,572) and IG employees at NETL sites (21) with OLC accounts. (Responsible POC, Phone Number)

(FE) OLC Administration – Account Maintenance. Created no new accounts, set up 2 accounts, terminated 3 accounts, and reset 6 passwords in OLC. (Responsible POC, Phone Number)

(FE) OLC Administration – ORD report. Created and posted "Learning History (CSV)" report to ORD shared drive. There were 208 course completions recorded from the report – (05/20/2016 – 06/03/2016). (Responsible POC, Phone Number)

Authorized Abbreviations and Brevity Codes

CAIRS	Computerized Accident/Incident Reporting System
CBT	Computer Based Training
CESER	Office of Cybersecurity, Energy Security, and Emergency Response
CTS	Contractor Training Site
CTS	Concurrence Tracking System
CV	Curriculum Vitae
DOE	Department of Energy
EDS	Energy Delivery & Security
EDX	Energy Data eXchange
EE	Energy Efficiency
EEO	Equal Employment Opportunity
EOTA	Emergency Operations Training Academy
EPIC	Energy Power Industry Conference
ES&H	Environment, Safety & Health
FEMA	Federal Emergency Management Agency
FN	Foreign National
ILT	Instructor Lead Training
IPC	Internship Program Coordinator
LAN	Local Area Network
LN	Learning Nucleus
MLEF	Mickey Leland Energy Fellowship
NTC	National Training Center
OE	Office of Electricity Delivery and Energy Reliability
ORISE	Oak Ridge Institute for Science and Education
OTS	Organizational Tracking System
PDAT	Planning Data for Approving Travel
PTS	Personnel Tracking System
PWS	Performance Work Statement
RA	Research Associate
RAD	Research Associate Dashboard
SF	Storage Facility
SME	Subject Matter Expert
STEM	Science, Technology, Engineering, and Mathematics
STeMS	Safety Training electronic Management System
STRIPES	Strategic Integrated Procurement Enterprise System
TAR	Travel Authorization Requests
TD	Technical Direction
WPA	Western Pennsylvania