BIL – WFO EXECUTIVE LEVEL ADMIN SUPPORT (FIRM FIXED PRICE)

CLIN 5 ACTIVITY 5

PERFORMANCE WORK STATEMENT

1. PURPOSE

The contractor will provide general and customer specific administrative support services to Associate Directors (ADs) and the National Energy Technology Laboratory (NETL) Technology Development Center (TDC) Directorates whose primary function is to perform project management functions for non-Fossil Energy Organizations, considered work for others (WFOs) in support of the Office of Energy Efficiency and Renewable Energy (EERE), Office of Electricity (OE), and Office of Cybersecurity, Energy Security, and Emergency Response (CESER), Grid Deployment Office (GDO, and Joint Office of Energy and Transportation (JOET) hereafter referred to as WFO Teams. These TDC Directorates have unique service requirements that require integrating processes and procedures from these disparate Department of Energy (DOE) Offices with those of NETL. The position also requires handling of business-sensitive official use only (OUO) information.

2. SCOPE

2.1 Types of Services

The Contractor shall provide the following types of services under this Activity:

- Executive Level Administrative Support

2.2 Resources

The Contractor shall furnish all personnel and training necessary to perform the work under this Activity.

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.

SERVICE AREA 3.1: TDC, EERE, OE, GDO, CESER, JOET- Executive Level Administrative Support

This support provides TDC WFO administrative support services to the NETL organizations described above. The support shall include, but not necessarily be limited to, the following:

A. Integration of NETL business processes with those organizations supported by the WFO Team. The integration will require a detailed understanding of both NETL processes and those of customer organizations.

B. Strong grammar and proofreading skills are required to draft, proofread, edit, and transmit correspondence (*letters, memoranda, reports, spreadsheets, presentations, forms, etc.*) pursuant to the U.S. Department of Energy Executive Secretariat Correspondence Style Guide, Gregg Reference Manual, and the U.S. Government Printing Office Style Manual using NETL's standard software programs and NETL applications. The use of computers is relied on heavily for organizational and reporting purposes. The contractor staff will be proficient in using Microsoft Office products (*e.g., MS Outlook and Office including Word, Excel, PowerPoint, Access, SharePoint, etc.*) Expertise with PowerPoint and Excel is required. Collect, copy, fax, scan, and file information needed to produce, distribute, and track such correspondence.

C. The contractor will apply best practices in producing high-quality communications and outreach work products. The contractor shall be able to use and manipulate Microsoft PowerPoint as needed.

D. The position requires working independently and confidentially on projects requiring research and preparation of briefing charts and other presentation material.

E. The position uses subject-matter knowledge and judgment to complete assignments consisting of numerous steps varying in nature and sequence. The position requires the ability to anticipate requirements to support the shifting demands of the WFO Team's fast-paced environment, a thorough knowledge of office work and routines to (1) choose among widely varying methods and procedures to prioritize and process complex transactions, and (2) select or devise steps necessary to complete work assignments efficiently.

F. The contractor will provide administrative support to the TDC WFO Teams. Responsibilities include managing schedules and appointments, preparing weekly schedules for staff (and daily schedules for supervisors), providing weekly deliverables to the supervisors, making travel arrangements (utilizing Concur for travel authorizations and vouchers and PDAT tools), receiving and directing phone calls, greeting visitors, filing, and general office coverage.

G. The contractor will coordinate logistics (e.g., scheduling, resources, etc.) for onsite, offsite, and software-based meetings and events.

H. The contractor will establish and maintain filing systems in accordance with NETL Procedure 243.1 Records Management (including document control on the Team's shared drive).

I. The contractor will support the WFO Teams by developing and maintaining task tracking systems to track assigned tasks.

J. The contractor will prepare purchase requisitions using STRIPES.

K. The contractor will prepare storeroom requisitions and ensure that items are tracked, received, and distributed promptly.

L. The contractor will utilize and maintain databases and information systems, answer telephones professionally, screen and route calls to the appropriate personnel, take accurate phone messages, and relay to appropriate personnel promptly.

M. The contractor will process document control and correspondence for the WFO Teams through the Organizational Tracking System (OTS), Concurrence Tracking System (CTS) for concurrence packages, and Action Tracking System (ATS) for action tasks, maintain the WFO Team's files and log for record of correspondence and documents executed and follow-up on status with customers.

N. The contractor will sort and distribute incoming standard mail pick-up and deliver correspondence packages and color-coded pouches shuttled between the receptionists at the Pittsburgh and Morgantown sites. The contractor will complete NETL F460.1-13, UPS Express Account and Authorization Approval form, used for the warehouse to ship items through UPS.

O. The contractor will coordinate logistics for meetings and events (e.g., scheduling, resources, Webex, MS Teams, and call-in numbers, etc.), provide meeting materials for attendees, maintain updates of the Director's Event Tracker System (ETS), and generate reports, as needed, to track and maintain record of events and meetings attended.

P. The contractor will assist in consolidating and editing various WFO Team reports.

Q. The contractor will set up and schedule interviews for new hires and assist with the onboarding process as needed.

R. The contractor will support staff with general typing, formatting of documents and reports, completing and submitting various forms and recordkeeping, work orders, and data entry. The contractor will fax, scan, copy, file, etc., as needed.

S. The contractor will assist with conference registration paperwork, document preparation, and approvals.

T. The contractor will maintain supply cabinets, copy rooms, and office equipment areas (printers, copy, fax, shredding, scanner machines, etc.), keeping them well stocked and in working order.

U. The contractor will complete and route work orders.

V. The contractor will utilize and maintain databases and information systems, including, but not limited to, the Visual User Environment (VUE) database. The contractor will review and reconcile data and generate reports from various informational databases using standard parameters or special queries as required. The contractor will provide data entry for startup or closeout information on projects.

W. The contractor will maintain a database for NETL visitor business cards. The contractor will scan business cards and enter contact information. The contractor will communicate with appropriate personnel to ensure information is kept current.

X. Occasional travel between NETL's Morgantown and Pittsburgh sites may be required.

Schedule / Deliverables:

A. The contractor must maintain a monthly log for each activity/report/deliverable type. The monthly log will include the items listed below under the surveillance method. Due to the nature of the various directorates' fast-paced environment, deliverables may change/vary to support the shifting demands.

B. For activities/reports/deliverables, the log will specify whether they are periodic (daily, weekly, monthly, quarterly, semi-annual, etc.) or ad hoc, the planned or agreed upon due date, number of revisions required, and the date (actual) the activity was completed, or the final, acceptable report/deliverable was provided. For ad hoc reports, the log will also include the name of the end user of the ad hoc report and a brief description of the nature/purpose of the report based on the customer's request.