

Patrick Ahearn, TechWerx

So good morning and good afternoon, everyone, depending on where you're joining from today. Thank you so much for being here for this webinar. a few quick announcements before we begin.

If you need any assistance today, throughout today's event, please use the Q&A window. I'm happy to address any technical issues you might have or need in there. The Q&A is also the best place to submit questions for our presenters today, and our panelists will try to get to as many questions as possible. And as questions are submitted, you will be able to upvote other questions, and that will help us understand which of those questions are the most interesting to all of you. Today's Office Hours is being recorded and will be posted for archival viewing. And lastly, if you'd like to use the caption function on your screen for today's webinar, find the CC button on your main Zoom toolbar and click on Show Captions. And each of you can individually manage that for your own screen.

So, without any further ado, I'd love to hand things over to our panelists and presenters to get us started. Thank you

Meghan Camello, TechWerx

Thank you, Patrick. Hello, everyone. We're very excited to host this Office Hours for the Partnerships for Academic Industry Career Training Initiative, or the PACT Initiative. This opportunity is being funded by the Department of Energy's Hydrocarbons and Geothermal Energy Office and Office of Indian Energy Policy and Programs. A brief intro.

My name is Meg, and I am part of the TechWerx Hub. I'll explain in a few slides what TechWerx is, but a couple housekeeping items before we get started. Questions will be handled toward the end of the session. We're going to be using the Q&A function of Zoom, as Patrick mentioned, so please go ahead, add your questions as they come up, upvote so that we understand priority. And just note that when you submit a question in the Q&A box, the name that you registered with to attend the office hours will appear with that question. If you'd like to ask a question offline, feel free to send us an email at info@techwerx.org. We may not be able to get through all of the questions here today, but we'll try to get through as many as we can. For those that we can't answer live today, we'll be passing those questions over to DOE and they'll work on getting them answered. All of the questions that we answer live, as well as any that we don't get to today, will be posted on the FAQ on the TechWerx website under the PACT Opportunity page.

And a couple other things. Per DOE guidance, we do not allow any AI chatbots on the webinar, such as tools like Otter AI or other note-taking AI bots. Though you shouldn't need them, because the webinar is being recorded, and the recording, transcript, slides, and all the questions will be available on the website in a few business days.

The Department of Energy, Hydrocarbons and Geothermal Energy Office and Office of Indian Energy Policy and Programs, through a partnership intermediary agreement with TechWerx, is seeking to increase the number of skilled individuals in the energy workforce.

TechWerx is an innovation hub designed to facilitate connections between DOE, academia, nonprofits, startups, and other innovators across the United States. The Hub is managed by RTI International, which is an independent research institute based in Research Triangle Park, North Carolina. TechWerx offers opportunities in many different topical areas, so we recommend that you follow us either on LinkedIn or sign up for our newsletter on our website, techwerx.org. That way you can be notified of any new opportunities as they are announced.

For this opportunity, TechWerx is working with the Hydrocarbons and Geothermal Energy Office and Office of Indian Energy Policy and Programs at Today, we're joined by representatives from these offices. We have Caleb Woodall, who's the Program Manager of University Training and Research with the Hydrocarbons and Geothermal Energy Office, and Raymond Redcorn, Tribal Affairs Specialist with the Office of Indian Energy Policy and Programs With that, I'll pass it over to Raymond to introduce himself and provide more information about the PACT initiative

Raymond Redcorn, DOE IE

Hey everyone and welcome. Thanks for being here and thanks for tuning in and for your interest in this opportunity. As Meg said, my name is Raymond Redcorn. I work in the Office of Indian Energy. We are an office that serves tribes first and foremost, and we're excited to be partnering with hydrocarbons and geothermal energy office on this opportunity in order to set aside some funding specifically for tribal colleges and universities. We are a resource to tribes on energy projects, so please feel free to refer us where needed. and reach out. We offer a lot of opportunities, including technical assistance and other funding opportunities. for tribes to advance energy in Indian country. And with that I will hand it over to Caleb

Caleb Woodall, DOE HGEO

Thanks, Raymond. My name is Caleb Woodall, and I work in DOE's Hydrocarbons and Geothermal Energy Office, and I manage the University Training and Research Program, or UTR program, which is the primary sponsor of the PACT Initiative.

In today's office hour session, we'll provide a brief overview of the opportunity and outline the requirements and process for submitting your application before leaving ample time for questions from all of you. The following presentation is an abbreviated version of the webinar we provided on May 13th. And you can find a recording of that, and a recording of our previous Office Hours session, and the slide decks from both of those sessions by scrolling to the bottom of the Opportunity page on the techwerx.org website.

So first, let's take an overview of the PACT Initiative opportunity. To remind everyone why DOE has developed the PACT Initiative, it's been developed to overcome the challenges stated by energy employers in the annual U.S. Energy Employment Report. So, through the PACT initiative, DOE seeks to improve the volume of trained, qualified personnel entering the

American energy workforce. The partnerships involved in awarded projects will facilitate the development of well-rounded training programs that lead to industry recognized credentials for in-demand, high paying occupations.

So, overview, objective, and funding. We have, as I just said, we have developed this to increase the number of highly skilled individuals entering the American energy workforce. DOE seeks to establish regional consortia to develop hands-on training and credentialing programs in skill areas that serve the natural gas, oil, coal, and geothermal industries. DOE has made approximately \$11.3 million available to fund projects at institutions of higher education. Up to \$2.3 million of this funding will be awarded exclusively to tribal colleges and universities.

There are two topic areas here at a high level. Awards under topic area A will involve enhancing an existing training program or reorienting it to focus on energy careers. And awards under topic B will establish new training programs that focus on energy careers. The number of total awards at each topic area will depend on the number of highly scored proposals that we get from you all, but a general range is given here on the screen.

Again, we have a number of eligible technology areas where you could look to be facilitating a training program to get folks into these technology areas on the screen. I'm not gonna read all of these to you, but, when identifying a technology area of focus, keep in mind the core mission of the Hydrocarbons and Geothermal Energy Office that, our really, our goal is getting folks to support the oil, natural gas, coal, and geothermal industries.

So, another part of this is that we're looking to support consortia with several members that collaborate to create a successful workforce pipeline. in those target industries. So we expect each consortium to involve one two-year institution of higher education, two industry employers, and one workforce development entity. The two-year institution should be the primary host of the training program where participants enroll and receive credentials upon successful completion of the program. The industry employers should be able to identify skills needed in the industry, they should recognize the credentials that are awarded by the training program, and they should be capable of hiring graduates of that program. The workforce development entity should be part of, designated by, or formally partnered with the public workforce system under the Workforce Innovation and Opportunity Act. This entity should have expertise in workforce development and should provide leadership in at least two activities listed on the opportunity page, such as understanding and analyzing regional needs for education and training, assessing potential participants for the program, and providing supportive services. The application must be submitted by an institution of higher education. This institution may be a two-year institution, but that part is not required. It just must be submitted by an institution of higher education. Other stakeholders, including DOE National Labs, Indian tribes, other educational entities, workforce intermediaries, regional apprenticeship and training representatives, even four-year institutions, can be included in the consortium but are not required.

Now let's review the process for awards through the PACT Initiative. At a high level, awarded projects in both topic areas will begin in phase one, planning. During phase one, the awarded consortia will develop an action plan to enhance or establish their training program. This could last between 2 to 12 months as proposed by the applicants. After successfully meeting go-no-go metrics, projects will move on to phase two, execution. And in this phase, consortia will implement the action plan through which the enhanced or established training programs will graduate at least one cohort of students. The project will last 12 to 24 months. Again, as proposed by the applicant in the proposal here. Also, part of phase two is the reporting. So, the awarded consortia will be responsible for submitting semiannual reports of student work placement rates for two years after the initiation of courses.

Alright, now here we're a week away now from submitting an application, so here's the details that you may want to go over now. Again, the eligibility criteria, as stated earlier, each consortium must include, at a minimum, one two-year institution of higher ed, two industry employers, and one workforce development entity. Other entities are, could be involved, and certainly we welcome larger consortia, but not required. The application should involve signed documents of commitment from each consortium member. It's not including the lead applicant, but every other organization involved should have a signed letter of commitment. In addition, the applicant must qualify as a domestic entity and certify that is not owned by, controlled by, or subject to the jurisdiction or direction of the government of a country of risk.

Finally, getting to the review criteria, proposals will be evaluated against five separate criteria. That is, demonstrating the regional need for this training program. The workforce strategies and metrics that will be employed through the program. Participants support services that will be provided to the participants of the program. The quality of the consortium team that is, being proposed and involved in this application and the potential program. And the work plan and budget that you propose. So, we highly encourage you to review the full details of the review criteria on the Opportunity page.

Now, I'll hand it back to Meg to discuss the steps to submit an application

Meghan Camello, TechWerx

Thanks, Caleb. Before I jump into this, we are almost done with the presentation portion, so I'll just remind you all to submit any questions you have in the Q&A.

To submit an application for the PACT initiative, applicants must fill out the application form, which is on the TechWerx website in the PACT opportunity page. There's a save progress bar at the, or box at the bottom of the page, and any work is saved automatically every 60 seconds. Within the application form, there are three uploads required.

First, there is the project narrative. This should include information that is relevant to the review criteria that Caleb just went over and that are outlined in the opportunity announcement. We have a project narrative template on the opportunity page, so we encourage you to leverage that. And there's a 7-page limit, including cover letter, for this upload.

The second upload is the budget template. Again, there is a budget template for download on the opportunity page that we encourage you to use, and the budget template must be uploaded as either an Excel XLS file or an XLSX file.

And then finally, the third and final upload is any supporting documentation. This would include the letters of commitment from the consortium partners. We are almost just shy of a week out from applications closing. Applications close next Friday, July 17th, and must be submitted by 5 p.m. Eastern. We encourage you all to submit it early in case you run into any technical issues. Applications are going to be reviewed during the fall, and we expect activities for those applicants that are selected to begin in the new year.

We are going to start the Q&A now. So, if you haven't already, if you have any questions about the application process, eligibility, scope, et cetera, click the Q&A box at the bottom of your Zoom toolbar and type your questions. Looks like we have one question so far. Is there an estimated start date? Also, what are the reporting requirements, and will it extend beyond grant contract period?

Caleb Woodall, DOE HGEO

I can take that. Thanks for the question. The estimated start date we have online as January of 2027. So, a little bit estimated, subject to a review on our end and negotiations. And then, what are the reporting requirements? We have, let me bring you back to this. So, in Phase 2, that's when we're executing the action plan, and we're going to have, the awards will involve starting the training program and having at least one cohort of students matriculate through the program. And so, we're expecting you to be reporting from 24 months from the beginning of when the students first start taking courses. And, included in the opportunity page, we say student work placement, but more specifically, we're looking for enrollment, retention, graduation and work placement rates. So, four metrics there that are outlined in the opportunity page that you're expected to be reporting on. The reporting period is included in the full project period. So, maybe most of the activity and the work might be a little bit front loaded on the project, and then there might be an extra 12 months or so that you're primarily spending time on the project, still enrolling and doing the courses, but also doing the reporting in the last 12 months or so. Hope that answers the question. Thanks

Meghan Camello, TechWerx

Thanks, Caleb. I see a question here on the estimated number of applications for Topic A. We're not able to speak specifically on the number of applications we expect to receive, but I believe, Caleb, correct me if I'm wrong, for Topic A, we expect 4 to 8 awards

Caleb Woodall, DOE HGEO

And this is essentially the math of having about \$11.5 million available total. It could be the case that, there's a lot more Topic Bs, and you see those are a lot heavier in amount, dollar amount, or it could be that we have a lot more topic A's and only one topic B where, we're keeping it open to see what applications we get and what are the best ones that meet our goals

Meghan Camello, TechWrx

Great. Thanks, Caleb. Thank you I see here a question around geographic focus in terms of regions that are focused on energy and how the grants are going to be allocated geographically

Caleb Woodall, DOE HGE0

Good question. If you look at the opportunity page under the merit review criteria or the review criteria. We have a few additional factors that may come into play if all else being equal for applications, we might consider wanting to have a good geographic distribution among the awards. But we we don't have any prescription upfront about that it has to be in one certain region of the U.S.

Meghan Camello, TechWrx

Great. Thanks, Caleb. I see a question. Oh, it looks like that was answered in writing.

If you have any other questions either about the opportunity at large, eligibility requirements, scope, technology areas of focus, feel free to put them in the Q&A. We also, on our opportunity page on the TechWrx website, we have a full list of all of the questions that we have received up until this morning about this opportunity. So, feel free to peruse that as you're preparing your applications or have additional questions.

Caleb Woodall, DOE HGE0

Is there an indirect amount that is allowed? We don't have a certain amount that we've stated. It would be your rate within your institution, and with the U.S. policy.

Meghan Camello, TechWrx

We have no questions at the moment. We'll stay on for a few more minutes. In case there are any lingering questions.

Here's a few. Is there any preference in solar? Do you want to go to the tech area slide?

Caleb Woodall, DOE HGE0

That's not listed in the eligible technology areas, nor is it within the Target industries that are repeatedly listed for this program, so, no, that's not eligible.

Meghan Camello, TechWrx

I see here a question around, are university overheads allowed?

Caleb Woodall, DOE HGE0

Same with indirect costs. it's whatever is commensurate with what you'll put in your budget, and we're looking for things that are commensurate with the effort.

Meghan Camello, TechWrx

I see here a question around partnerships. Are partnerships with local unions encouraged or accepted as part of the industry partnership agreements?

Caleb Woodall, DOE HGEO

I would say accepted, I wouldn't say yay or nay on encouraged, but we're looking for robust partnerships that help get individuals that get their credentials into in demand jobs in our target industries. So, if that's a partnership that works for you, then go for it.

Meghan Camello, TechWerx

I see here a question around the letters of support. Are at least four letters of support required? Does every single consortium member need a letter of commitment or the two industry partners and one workforce development partner that we list on the actual application? The sign commitments are for whoever is on your consortium listed as a partner, we need a letter of commitment. We don't need one from the prime applicant, though.

Caleb Woodall, DOE HGEO

I don't know if that's where your 4 comes from, but 3 at least, the 2 industry employers and the workforce development entity, but we do want a signed letter, so we know that organizations' names aren't being thrown out there, and we know that they know that they're involved and they're committed to this. It does not have to be an MOU. We've addressed this in other questions but do need a signed letter of commitment.

Meghan Camello, TechWerx

We have a request around the technology area slide. And all of these are listed on the opportunity page as well, so you could find those there.

We have a question here around the limitation page limits for the project narrative. What strategies do you encourage for a strong application to get all of the information across in the seven-page limit?

Caleb Woodall, DOE HGEO

I don't know, how to provide strategies. I would just say we tried to outline some of the key things in the template that could help you ultimately address what the review criteria are asking for. And then there's also an opportunity within the budget template to provide information on the milestones that you will set as well. And, I think with any proposal, there's a balance of being direct and brief for the reviewers while also being, descriptive. To give enough information for us to know that this is going to be a strong effort, but no specific strategies there.

Meghan Camello, TechWerx

To echo, the project narrative template and the budget template are two separate attachments. So, both of those templates are available on the website.

We have a question here around, qualification of industry partners. Are energy trade associations considered, an industry partner?

Caleb Woodall, DOE HGEO

We laid out what we expect from an industry employer partner. What we've defined is that it's someone that can identify the needed skills, that can recognize the credentials that are awarded through this training program, and they are capable of hiring the graduates out of there. So, if your partner meets that definition. And this is abbreviated version on the screen here and I would read the full opportunity page but if they meet those 3 criteria, then that would be what we're looking for.

Meghan Camello, TechWrx

Great, thanks, Caleb We have a question here. If a proposal intends to integrate courses to improve a program on construction and plans to create a new program on GIS, should the industry partner letters be focused on the creation of the new program or both?

Caleb Woodall, DOE HGEO

Well, I think this if it's for one application and one consortium that you're creating, then the industry partner letter should be about the one consortium that they are proposing to be a part of. If you're talking about two separate applications that you're involved in, then they need to have a support letter for each of those individual applications

Meghan Camello, TechWrx

Great. Thanks, Caleb. And I see two questions around like indirects or salary supported for PIs, co-PIs, project managers. I think we spoke to this earlier, but this is up to the applicant to determine

Caleb Woodall, DOE HGEO

Include in the budget. We have the budget ranges here on the screen and in the opportunity page, and it's up to the applicant to determine how to use that budget for the proposed effort.

Meghan Camello, TechWrx

Great. Any other questions? Feel free to add in the Q&A.

I'll just remind you all that applications are due I don't know. Next Friday, July 17th. by 5 PM Eastern Time. Make sure it's 5 PM Eastern Time. If you have any issues with submitting an application, or if you have any questions following this Office Hours, feel free to send us an email at info@techwerx.org. All of the information that we cover today, as well as in previous office hours or webinars, is available on the website. And that's the best place to go for the latest information.

I see here a question. New equipment is an option for enhancement. Does this include or allow for new software and hardware? What about maintenance and repairs to existing equipment?

Caleb Woodall, DOE HGEO

I would say both of those are eligible. They're looking to enhance the existing program. And so, I would steer away from something that is doing things that might be seen as minimal changes

to a program that could be done otherwise, but we're looking to improve your ability to prepare students for careers in our target industries.

Meghan Camello, TechWerx

Great. Thanks, Caleb. We have no questions left. We'll stay on for a few more minutes if any come up. But again, if you have any questions as you are finalizing your application over the next week or so, feel free to send us an email at info@techwerx.org, or we have a Contact Us button on our website, techwerx.org, and that will send it right to our inbox.

Right, I'm not seeing any new questions pop up, so, I think with that we can close the office hours.

Again, feel free to reach out via email and we're excited to get your applications over the next week or so.

Thanks, everyone. Thanks for attending.

Caleb Woodall, DOE HGEO

Thank you, everyone