Tips for When You Know You Are Visiting a Funding Agency

Reasons to visit the Program Officer or Manager

• Learn more about an agency and its priorities
• Develop a rapport with the Program Manager/Officer
• Request participation on a review panel
Preparation for the Visit

• Speak with your Associate Dean for Research, Department Head or colleagues. Seek advice on what has worked and has not worked.
• Research the recent funding history of the agency.
• Review recently funded proposals to the agency.
• Email requesting an appointment with the program manager that includes:
  ▸ short overview of your interests
  ▸ How your research would fit into the agency’s objectives
Send to the Program Officer Prior to Your Meeting:

• A summary of your research interests.
• Your strengths as a PI.
• A short (1-2 page summary) of your proposed project(s).
• An updated CV in the agency’s required format.
• A link to your website. Be certain the information on your website is current.

• Include information relevant to the proposal guidelines, such as Broader Impacts, gaps in current research, overall goals, and expected outcomes.
Preparation for the Visit

• Prepare a list of questions for each program office meeting.
• Decide what you hope to achieve in the face-to-face meeting including what type of feedback you want.
• Practice speaking, concisely, about your research interest. Often referred to as an “elevator speech” be prepared to quickly reiterate the information that was sent previously in an email in 2-3 minutes.
What to expect during the meeting

• Be respectful of the Program Manager’s time. Generally, the meeting will not last more than 30 minutes.
• Bring copies of the information that was emailed prior to the meeting.
• In addition to the “elevator speech” address areas of strength in you as a researcher, the University of Alabama and why your research project matters.
What to expect during the meeting

• Ask questions and be prepared to listen. Take detailed notes during the meeting and summarize what you learned soon after the meeting.

• **Express interest in participating on a review panel.** There are numerous benefits to serving on review panels and committees.
After the meeting

• Send a thank you email to those who met with you and continue contact as appropriate.
• Restate your interest in serving on a review panel.

• Reporting the outcomes of the meeting:
• Prepare a brief (1 paragraph -1 page) overview of the meeting(s) that includes:
  ▸ The agencies and individuals you contacted
  ▸ An overview of what was learned and your next steps
  ▸ Tips or insights that would benefit other UA faculty who might visit these agencies