

# 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