

# 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

- Once it has been determined that a visit to the agency would be beneficial, speak with your Associate Dean for Research, Department Head and/or colleagues who have knowledge of the agency or the person with whom you are meeting. Seek advice on what has and has not worked in the past for other UA faculty.
- Research the recent funding history of the agency, division or organization. Review past program announcements, special reports, workshops, etc.
- When possible, review proposals recently funded by the agency. Many agencies make the abstracts from their awards available on their websites.
- Send an email requesting an appointment with the program manager. Include a short overview of your research interests and how they would fit into the agency's objectives. Include a link to your UA website and ensure its content is current, relevant and appropriate.
- Prepare a summary of your research interests, your strengths as a PI, a short (1-2 page) summary of your proposed project(s) and a current CV in the agency's required format. Send these items to the program officer prior to your meeting. Include information specified in the proposal guidelines, such as Broader Impacts, gaps in current research, overall goals and expected outcomes.
- Prepare a list of questions that will prompt the type of feedback you want.

## 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 you sent prior to the meeting.
- Be prepared to discuss (briefly) the information you sent prior to the meeting. Present a quick summary of your program. Other areas to consider discussing:
  - your strengths as a researcher
  - the strengths of The University of Alabama
  - why your research project matters
- Ask questions:
  - Does this proposal fit into the priorities of this agency? If not, do you have any recommendations?
  - What would you suggest to strengthen the proposal?
- Be prepared to listen! Take detailed notes and summarize soon after the meeting.
- Express interest in participating on a review panel, committee or task force. Numerous benefits can come from 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.
- Please prepare a brief (1 paragraph – 1 page) overview of the outcomes of the meeting(s):
  - include the names of the agencies and individuals you contacted
  - an overview of anything you learned and your expected next steps
  - tips or insights that would benefit other UA faculty who might visit these agencies in the future

Please send this overview to Angie Shotts in the Office for Sponsored Program at [ashotts@fa.ua.edu](mailto:ashotts@fa.ua.edu).