Guidelines for Successful Agency Visits

I. Prior to the meeting

- You should review the programs of the officials with whom you will be meeting and other relevant funding opportunities at their agencies. (As you are reviewing program descriptions and past solicitations, note places of potential fit to your areas of interest so you can ask specific questions.)

- You should prepare a one-page description of your research (including your contact information) that may be left behind with the program staff, or sent ahead if that has been requested. Research descriptions should be consistent with areas of interest of the targeted agency program staff.

- You may wish to speak to more senior investigators who are funded by the federal agencies at which you will be meeting about their experiences and insight into the agencies and programs.

- You should prepare questions to ask in the meetings. (See next page.)

II. On the day of the meeting

- You should bring business cards and copies of your research descriptions. Appropriate dress is business attire.

- You should be prepared to talk succinctly and clearly about your current and future research interests, including being able to give a short introduction (5 minutes) about you and your work.

- You should be prepared to take notes.

III. Meeting follow-up

- Upon returning to campus, you are encouraged to submit appropriate thank you emails to each of the meeting participants. These emails should display an appreciation for the meeting, a quick reference to or summary of the issues discussed, any follow-up actions or conversations agreed to, and supplemental information if applicable.

- As you initiate contact with various agency officials, it is crucial that you maintain open lines of communication, especially if these contacts have displayed a willingness to accept unsolicited research proposals or provide unofficial advice. Federal program officials can be key advisors and sources of information throughout the challenging grant application process.
Preparing Questions for Agency Visits

Overall Goal: To introduce you to the agencies, and the agencies to you.

Questions to Ask:

Examples of generic questions to learn about the program officers’ program and their agency processes:

- What are the areas of interest of your program?
- What are the emerging areas of interest at the agency in your area?
- What are the mechanisms to seek funding at your agency and in your program? Are there targeted solicitations? Are you open to unsolicited proposals? Is there a recommended approach?
- How can I better prepare to submit proposals? At what point in the process is it appropriate to discuss specific project ideas with agency personnel/program staff? What kind of feedback can I expect?
- What are the success rates, and what helps with resubmittals?
- Are there opportunities to serve as a reviewer or on advisory committees?
- Are there researchers whose work you would suggest I look into or that I collaborate with?
- Are there workshops or events you would suggest I participate in or help organize?
- Are there program officers at this or other agencies you recommend I contact?

In addition, you should prepare questions specific to your research areas of interest to better understand their program goals and how your current or future research may align with their activities. You can also prepare questions specific to the funding mechanisms and processes in place at the relevant agencies.

Note: This is a LISTENING/LEARNING experience. The goal is to let program officers know enough about your research to understand where you are coming from and then allow them to provide relevant advice to you on applying for grants and what research directions are of interest to them. You are gathering information while raising their awareness of you and your research capabilities.