



Guide for a Successful Visit to a Funding Agency

The importance of visiting federal funding agencies to learn about their priorities cannot be overstated. However, a visit will only be successful if you do the necessary groundwork beforehand and if you follow up on what you learn during the visit.

The goals of a visit are not only to learn about what the agency may offer you (possible funding opportunities), but also for the agency to learn what you may offer them (your expertise). Important outcomes resulting from an agency visit might include invitations to serve on a proposal review panel, committee, or task force. These are very valuable opportunities, and you should capitalize upon them when possible.

Pre-visit Preparation

1. Conduct background research to understand the agency's funding priorities.

- Browse the agency's Web site for program announcements, "dear colleague letters," and special reports of symposia, workshops, and task forces.
- Search the National Academy of Sciences, National Research Council, and White House Office of Science and Technology Policy Web sites for reports that foreshadow shifts in research priorities or that detail upcoming initiatives.

2. Prepare a summary of your research interests and strengths.

- Compile or update a half- to one-page version of your descriptive CV or a biographical sketch in the format appropriate to the funding agency (e.g., NIH or NSF).
- Provide a list of your peer-reviewed publications (maximum one page) relevant to the program you are targeting.
- Include a list of your key federally funded projects.

3. Compose (at least one month in advance of your visit) a two-page white paper on your proposed research project(s) that includes:

- Title
- Overall goal
- Outline of the problem to be addressed
- Gaps in the current research
- Questions the proposed research will address
- Potential impacts/outcomes

4. Select appropriate program officers, arrange for a visit, and share your white paper with them via e-mail at least one week in advance of the visit.

- Contact multiple agencies and multiple programs within agencies to determine the best fit and greatest interest for your work.

Meeting with Program Officers

1. Be prepared to provide a brief, concise description – no more than 15 minutes long – of your research interests and strengths. The program officer will already have your white paper in hand, so you do not need to reiterate all the information included in that document.

2. Give the program officers ample time and opportunity to comment on your research and to explain their programs. That is why you are there – to get their ideas. Listen carefully and take detailed notes.

3. Exchange business cards with the program officers you meet.

4. Review and summarize your notes as soon as possible following the meeting.

5. Prepare a summary report of the visit and submit a copy to the Vice Chancellor for Research and Economic Development. The summary report should include the following:

- The names of the agency or agencies you visited and the programs you contacted, and the names of the program officers with whom you interacted.
- A brief overview of what you learned.
- A summary of outcomes and task-actions for follow up: funding opportunities, review panel or committee service, etc.

6. Send a thank you note to each program officer/contact person with whom you interacted. Continue to communicate with interested program officers as appropriate.

7. Respond positively to any offers from program officers to serve on review panels, committees, or task forces. These are important outcomes of your visit!

The Office of Proposal Development can assist you as you prepare for meetings with funding agency representatives by helping you develop customized marketing materials and white papers that present your research in a dynamic, easy-to-understand format. Contact Tisha Mullen for additional information (402.472.2894 or tgilreathmullen2@unl.edu).