

## Tips for a NSF Site Visit

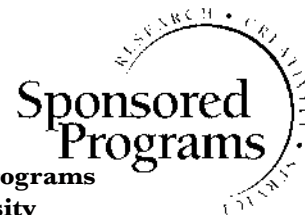
Considerations for a site visit with a National Science Foundation program officer:

- Have 2-3 discrete ideas in mind to discuss with the program officer.
- Plan to visit multiple programs since your research ideas may be applicable to several programs.
- Learn the funding priorities of each program.
- Inquire about the processes of different scientific disciplines and programmatic histories.

## Tips for a NIH Site Visit

Considerations for a site visit with a National Institutes of Health program officer:

- Identify the most appropriate Institute/Center and person to meet by sending your short summary to the Scientific/Research contact for each seemingly relevant institute. Ask them for suggestions of which Institute/Center is most appropriate and to whom you should contact/meet to discuss your questions.
- Try not to set up the meeting near one of the three cycle deadlines as the program officer will likely be very busy.
- Ask about incorporating innovation into your proposal. Outside of development of a new model organism or a new technology, what other things constitute innovation?
- Ask about the focus of different Scientific Review panels and which might be most appropriate.
- Describe to the program officer the research environment of your lab, the student training experience you have, and your successes.
- Ask several broad questions about specific elements in your proposal and how they relate to the program goals.



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# Contacting a Grant Program Officer

... to determine if a funding  
opportunity is a good fit for  
your research project

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## Why contact a program officer?

Prior to submitting a written proposal, contact a program officer to determine:

- Is the research project a good fit with the program's goals and objectives?
- Does the project design use the right approach?
- What are the most important components of the proposal?
- What institutional support would you like to see in a fundable proposal?
- Are there certain types of projects that are currently "hot" that you are more likely to fund?
- Any recommendation of other funding tracks for the research?

The chance of being awarded increases if your proposal fits well with the research endeavors the program manager is charged to fund.

The first step in the process is to identify a grant program with goals and objectives that align with your research project. Review recent awards to understand how your research contributes to a base of knowledge or fills a gap. Remain within your area of expertise but be prepared to adjust the proposed project slightly to fit with the grant opportunity.

## Email Contact

The first initial contact with a program officer is typically via email. Using concise, concrete, and non-technical terminology, prepare a half-page summary of the proposed project which includes the significance, main objective(s), methods, and expected outcomes. Stress how the project is unique to existing research and how it will contribute to the field of knowledge or solve an important problem. Explain how the proposed project addresses the grant program's goals and objectives. Conclude the email by inquiring whether your proposed research may qualify for funding.

The email should prompt a response from the program officer within a few days. If you receive any type of encouragement, whether it's to a different funding program or hints about how to strengthen your proposal or even to send a lengthier description of your project, follow through as quickly as possible and take the project to the next step by calling the program officer.

## Phone Contact

After the email exchange, it is relatively easy to begin a phone conversation with the program officer. Use this time to learn the critical success factors and the unofficial rules related to the grant program to help you decide if the funding is targeted towards your research project or how to shape your proposal for a favorable review.

### Do ask:

- Does my project fall within your current priorities?
- What would you recommend to improve my chances for a favorable review?
- What is the anticipated proposal success ratio?
- Do you expect last year's average award amount to change this year?
- What are some of the common reasons for proposal rejections?
- What are the guidelines for project duration and budget? (If not included in program announcement)

### Don't ask:

- The program officer to review your proposal before it's submitted.
- If the program officer likes your idea or proposal.
- For examples of funded proposals.
- For recommendations of co-principal investigators for your project.
- The program officer to serve on your advisory board.
- The program officer to visit your campus.

Follow up with a short thank you email to keep the lines of communication open and it gives you an opportunity to summarize the key points you heard in the conversation. For a graduate education in grant writing, volunteer to serve on a review panel and include a one-page curriculum vitae with your picture on it. Guidelines as to when you serve on a review panel vary between agencies.

## Meeting with the Program Officer

If you have the opportunity, plan a trip to visit with the program officer. The experience will help the program officer get to know you and your research better and it gives you a clearer understanding of how the process and agency works.

- Email the program officer to arrange a date and time for the visit.
- Send the program officer a one-page summary\* of your proposed research.
- Bring along a packet of information for the program officer such as your business card, SCSU Outlook, OSP Annual Research Profile, Colloquium Proceedings, and college/department/unit/program information.
- Arrive early and be prepared because everyone's time is valuable.
- The same do's and don'ts apply as when making phone contact.
- Start by briefly describing your institution/dept and your research environment (lab, students, available resources, etc.).
- Inquire about the history, focus, and funding priorities of the agency.
- Ask questions about how the review process works and related timelines.
- Inquire about the possibility of serving on a future review panel (be sure to bring along a one-page curriculum vitae).
- Take lots of notes because the information gained through the conversation is invaluable.
- Visit should last 30-60 minutes.

\*Use concise, concrete, and non-technical terminology. Include the significance, main objective(s), methods, and expected outcomes. Stress how the project is unique to existing research and how it will contribute to the field of knowledge or solve an important problem.

*A program solicitation is like the tip of an iceberg. Much of what you need to know about the program, such as its critical success factors, you will discover through contact with a program officer. Learn the unofficial rules of the game at the outset. Remember, the Titanic sank from the part of the iceberg below the water.*

Robert Porter, University of Tennessee