

Congratulations on making the important step to visit with a grant program officer. Statistics show that making a personal connection with your program officer will increase your chances of getting funded immensely. Following are some tips, based on past experience, to help make your visit as successful as possible.

Five Steps

1. Identify a program officer. 2. Prepare a concept paper / abstract. 3. Make the first contact with the program officer via email; set up ½ hour appointment for future visit. 4. Talk /meet with the program officer. 5. Follow up after the meeting.

Create a Concept Paper to Provide to the Program Officer

To plan for the visit, prepare a *brief* 1-2 page concept paper that you can email beforehand and/or hand to the program officer at the beginning of the meeting. Be ready to discuss a specific proposal. The format is flexible, but include:

1. Overall goal and objectives of the proposal. SMART objectives should be specific, measurable, achievable, relevant, and time-bound.
2. Describe the problem to be addressed. Use Heilmeier's Catechism - <http://cseweb.ucsd.edu/~ddahlstr/misc/heilmeier.html>
3. Refer to your unique personnel, resources, collaborations, whatever strengths will stand out in your proposal
4. To the extent possible, use the agency's format, style, and terminology.
5. For the title of the concept paper, use an eye-catching newspaper-like headline (think of benefits and potential impact of proposal). This is not going to be the same as the title of your subsequent formal proposal.
6. Use headings, color, and institutional branding, and employ meaningful graphics to assist in telling your story.
7. Ask others to review and provide feedback.

Meeting Logistics (Although a face-to-face meeting is best, Skype, Facetime, or phone calls also work well.)

1. Well before meeting, send an email to introduce yourself. Attach your concept paper & biosketch in agency format. Ask to set up a ½ hour meeting. Try to avoid peak review panel season if possible, a busy time for them.
2. Prior to the meeting, confirm the date, time and location.
3. Be on time. At the meeting, listen closely for his/her advice and recommendations. Program officers will sometimes be willing to advocate for your proposal or refer you to other programs if appropriate, or even find other pockets of funding at times. This type of 'inside information' can be invaluable to you.
4. Plan to keep the meeting within the planned time constraints, but take your cue from the program officer.
5. To keep communication open, follow up with a thank you note to the program officer, including a brief written summary of the conversation. Also share this with university administrators and any collaborators.

Other Tips

1. Do your homework on the grant agency beforehand so you have a good understanding of how it works.
2. Though 1-on-1 is best, if a face-to-face 'live' meeting is not possible, Skype, Facetime, or even a phone call is a good alternative, better than no contact. Proposals are too much work to be submitted as 'a shot in the dark.'
3. Customize questions. For NSF, ask about ideas for broader impacts. For NIH, ask which study section to target.
4. Do NOT ask who is on the review panel, but it's appropriate to ask about the types of expertise of reviewers who will be on the panel. Do NOT ask if a Congressman can help or provide a letter of support. Do NOT ask for a copy of a funded application, or if a particular person got funded - that information is available elsewhere.
5. DO ask how proposals from early career applicants are handled, if applicable to you. For other appropriate questions to ask program officers, as well as other good advice, see "[Can We Talk? Contacting Grant Program Officers](https://www.okhighered.org/grant-opps/docs/can-we-talk-contacting-program-officers.pdf)" at <https://www.okhighered.org/grant-opps/docs/can-we-talk-contacting-program-officers.pdf> and "[How to Get the Most Help from your NIH Program Officer](http://www.biosciencewriters.com/How-to-get-the-most-Help-from-your-NIH-Program-Officer.aspx)" <http://www.biosciencewriters.com/How-to-get-the-most-Help-from-your-NIH-Program-Officer.aspx>

Questions? Need help?

Email ndsuhelp@ndsuhelp.edu. See http://www.ndsu.edu/research/research_development/