***The importance of visiting funding agencies and learning about their priorities cannot be overstated, but a visit will only be successful if you have done the necessary groundwork before you visit and if you follow up on what you have learned after the visit.***

The goals of a visit are not only to learn about what the agency can offer you – possible funding opportunities – but also for the agency to learn what *you* can offer them – your expertise. Important outcomes of a visit might include invitations to serve on a proposal review panel, committee, or task force. These are very valuable opportunities and you should take advantage of them if at all possible.

**Pre-visit Preparation**

1. Background research to understand the agency's funding priorities:
   - Thorough search of the agency's Web site for program announcements, "dear colleague letters," special reports of symposia, workshops and task forces.
   - Web site search of National Academy of Sciences, National Research Council, and White House Office of Science and Technology Policy for reports that foreshadow shifts in research priorities and important new initiatives.
2. Prepare a summary of research interests:
   - Half-page to one-page descriptive CV or a CV in the format of the funding agency, i.e., NSF or NIH biosketch
   - List of key publications (maximum one page) - these should be matched to the program you are targeting and may vary with different programs.
   - List of your key funded projects.
3. Prepare one month in advance 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 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.

**Meeting with Program Officers**

1. Be prepared to give a brief, concise description - no more than 15 minutes long - of your research interests. The program officer will have your white paper, so you don't need to reiterate all of that information.
2. Give the program officers ample time to comment on your research and to explain their programs. That is why you are there - to get their ideas. LISTEN CAREFULLY and take notes.
3. Leave your business card with the program officer.
4. Review and summarize your notes as soon as possible after the meeting.
5. Prepare a summary report of the visit and submit a copy to the Vice Chancellor for Research.
   - Agency you visited, name of program and program officers contacted.
   - Brief overview of what you learned.
   - Outcomes: funding opportunities, review panels/committees.
6. Send a thank you note to each program officer/contact person. Continue to communicate with interested program officers as appropriate.
7. Respond positively to any offers from the program officers to serve on review panels, committees, or task forces. These are important outcomes of your visit!