Reaching Out to Program Officers

Why Talk to Program Officials (POs)?

- Gain insight and clarification on guidelines, priorities, the review process, budgets, and future directions
- Receive advice and guidance on your aims, approach, study design, and how to make your proposal more competitive
- Be directed to other programs or funding opportunities that align with your research
- POs may advocate for your research and proposal during the review process
- Build long-term relationships with funding agencies
- Some POs will offer to review proposal drafts

How to Find the Right PO?

- Start with the contact person listed in the funding call - they can help you connect with the appropriate PO if they are not it
- NIH: Use NIH RePORTER and Matchmaker to identify past awards and associated POs
- NSF: Use the NSF Award Search Tool and Staff Directory for relevant POs

When Do You Reach Out?

- Contact them early, ideally six months prior to the proposal deadline, or shortly after receiving your summary statements after review, to discuss revision and resubmission
- Wait until you have a draft summary/aims/objectives and a clear purpose for reaching out (i.e., determining program alignment, clarification on program specifics)
- Avoid reaching out close to common grant deadlines

How to Effectively Engage?

- Initial Contact Method: Use email first to schedule calls or Zoom meetings.
    - Facilitates productive discussion with the PO
    - Allows you to find a time convenient to them
    - Gives them an opportunity to prepare
- PIs or research team members should make contact
- Do not repeatedly contact; wait two weeks before trying again.
    - If you don't hear back, consider reaching out to a different PO
- Do not email multiple POs at the same time, especially not within the same email.
- Attach a one-page summary, abstract, white paper, or specific aims page:
    - Problem/Background: Explain why this topic needs funding/study.
    - Alignment: Demonstrate your understanding of the organization's priorities.
    - Significance: Address its importance to the field and the gap it fills.
    - Research Question: State the hypothesis you will test.
    - Design/Analysis: Outline the proposed methodology.
    - Team: Identify key participants/collaborators.

During the Initial Meeting

- Consider having someone else join a meeting to take notes so you can fully engage in the conversation
- If via Zoom, look at the other agency attendees on the invite and investigate their role
- Questions to Ask:
  - Does my research align with the mission and priorities of the agency, organization, and/or program?
  - Is the proposed work novel and innovative enough to be fundable?
  - How much preliminary data do you expect?
  - Ask for clarifications about RFP, what's allowable in the budget, etc.
  - Ask questions about the review process
  - Specific inquiries about what directions you might take, choices in methodology, potential collaborators, etc.

Other Options for Engaging POs

- Talk to POs at conferences & regional seminars
- Attend agency webinars and office hours for specific programs

Information From Sponsors

- NIH - We don't bite! Communicating with your program officer
- NIH - Talking to NIH Staff About Your Application and Grant (NIGMS)
- NIH - Understand Staff Roles
- NSF - Tips from GEO Program Officers - includes an email template

General Dos and Don'ts

Do…	Don't…
Use email first to schedule calls or Zoom meetings - allows you to find a time convenient to them and gives them time to prepare	**Cold call POs** - they are busy and interact with a lot of different people
Have a concise summary document and a purpose for your email	**Email if you are not sure** about your research plan and don't have a summary to share
Email one PO at a time	**Email a group of POs** at the same time, especially not on the same email
Have the lead PI make the initial contact	**Have a staff person** or co-PI contact the PO on your behalf
Reach out early in the process (~6 months), give at least two weeks for any feedback on a draft, reach out soon after receiving summary statement to discuss for resubmission	**Reach out one week before** the deadline expecting feedback on your proposal

General Introductory Email Tips & Template

- Email Subject: Be specific and give context
- Funding Opportunity: Make sure to include the name and number of the funding opportunity and the deadline
- Investigator: Share your background and research program
- Proposal Information: Include your title and a summary of the project
    - Optional: Attach one-pager or specific aims
- Request: WHY are you emailing? If you hope to set up a meeting, include some availability over the next few weeks.
- Closing: Thank them for their work, let them know you are available for more questions
- Contact Information: Make sure they know who you are and how to reach you
- Editing: U-M GPT can help make sure your tone is appropriate and check grammar

Dear Dr. [Name],

At your convenience, I'd like to discuss my/our planned submission to [funding program/number] for [deadline] and my/our project's potential to advance the program/agency's [specific research priorities].

Please find attached a draft summary of my/our proposed plans to [short 1-2 sentence summary of the proposed work].

If you can find time for a brief phone call or Zoom meeting in the coming weeks, I/we would appreciate it. I/We am available [some day/time options in a bulleted list].

Thank you for your time. I/we look forward to connecting with you. Please do not hesitate to reach out for more information.

Sincerely,
[Name]

[Title]
[E-mail]
[Phone]