

PROGRAM OFFICER OUTREACH GUIDANCE

The guidance provided in this document is intended to support outreach to Program Officers. Outreach by email is generally recommended as the first step to introduce yourself, identify a particular funding opportunity that you are targeting, and provide a high-level synopsis of your proposed contents (Step 1). After this initial outreach, an email exchange and potential call are anticipated and summarized below in Steps 2 and 3. Step 4 concludes the correspondence with the PO with suggestions for a summary email.

STEP 1: SENDING AN INTRODUCTORY EMAIL

The following template is a suggested email outline to guide your initial Program Officer outreach.

- Use the Subject Line to summarize the purpose of this outreach.
- Indicate to which program you are applying, if known.
- Use 1-3 sentences to present your request, e.g., “I would like to inquire as to the suitability of the proposed research to meeting your program’s objectives,” or “I feel that the proposed research addresses Objective 1 of the program in that..., and I would like to confirm my understanding of the program objective.”
- Include 4-6 sentences summarizing your proposed project, including project objectives, approach, expected results, and how the research will contribute to the field.
- Add 2-3 sentences providing your background and introducing your research program.
- Finish the email with 1-2 closing sentences acknowledging the PO’s time and efforts, and that you look forward to the PO’s response.
- If requesting a call, offer to schedule at the PO’s convenience (preferred option) or offer several possible dates/times for a call (only if absolutely necessary).
- Ensure that your full contact information is provided in the email.

SAMPLE EMAIL

Subject: *Request for call to discuss XXX due on DATE*

Dear Dr. X:

I am interested in submitting a proposal for PA/RFA #XXX “Title” and would like to schedule a call with you to discuss whether my research is appropriate for this opportunity. [If your request is urgent, indicate that here and explain why.]

[Summarize your proposed project (4-6 sentences) including project objectives, approach, expected results, and how the research will contribute to the field. Briefly describe your proposed work and why you think it is a good fit.] If it would be helpful, I can provide a [brief concept paper / specific aims] for you to review prior to our call.

I am trained as a xxxxx and have been working to develop my research program in xxxxxx (2-3 sentences).

Thank you in advance for your assistance. I look forward to hearing from you and would gladly schedule a call with you at your convenience.

*Sincerely,
XXXXX XXXXXX
Contact Info*

STEP 2: FOLLOW-UP CORRESPONDENCE

You should receive a response within a week—study it for tone and nuance in addition to the direct message. You might receive a recommendation to contact a different Program Officer. There might be hints about how to strengthen your proposal. Some Program Officers will ask to see a longer description of your project—usually a positive sign.

If the Program Officer responds to your email but does not suggest a call, thank the PO for his/her response and a request to discuss the initial correspondence by phone. Offer to schedule the call within the next few weeks at his/her convenience or suggest a few dates/times that work for you,

If the Program Officer agrees to a discussion (and many will) but does not respond to the offer of a concept paper or aims, offer again and send it by email if requested/accepted.

STEP 3: PREPARING FOR THE PO CALL

During the call itself, the following list of questions can guide the discussion:

- Is this project a good fit / competitive for this opportunity / your funding priorities?
- Are there other opportunities that would be a better fit?
- What are your recommendations for improving the fit / competitiveness?
- What other recommendations do you have?
- What are the most common causes for proposals being declined for this opportunity?
- What are the usual success rates for this program?
- What is your preferred method for me to contact you if I have additional questions?
- Other questions that reflect your specific needs.

STEP 4: FOLLOW-UP AFTER THE PO CALL

After your call with the PO, send a follow up email thanking the PO for his/her time and summarizing the key points you took away from the call.

If there is any future communication about this opportunity, reference your call (with date). Change the subject line of your email to reflect the purpose and urgency of the request.