

“Best Practices” for calling on agency Program Officers...



Assemble your team...PI, co-PI(s), evaluators, etc. – and a scribe to take notes.

- BEFORE calling – read the RFP carefully so you don’t waste her/his time... **very important!** Don’t make the PO do your leg work.
- Send an e-mail with the project concept (in text or as an attachment) and solicit a telephone appointment time, or better, F2F.
- Consolidate all your questions & have your specific “elevator speech” ready to get the discussion going... then, let the PO do the talking while you the listening.
- Your scribe will listen only and take detailed notes.
- After the meeting – the PI sends the PO a follow-up e-mail thank you with the next steps you plan to take. Follow the PO’s advice!
- The scribe will send a summary of the discussion to all participants (not including the PO).

A sample email to a Program Officer...

Dear Dr. Programeister,

I would like to schedule a telephone conversation with you to discuss a research proposal I am developing for possible submission to the Economics program, PD 98-1320, closing date March 15, 2014. A brief description follows.

I can call you next week on Thursday, 12/19 at 9:00am or 1:30pm EST or on Friday, 12/20 at the same times. However, I can arrange my schedule to call you anytime that week of Dec. 16. Please let me know the best time for your schedule.

Regards, Rich Redfearn

Title: "Econometrics Description of the Causes and Consequences of a Jobless Recovery"

This proposal outlines a long-term research and teaching agenda related to the economics of recovery from recession without a concomitant recovery in jobs lost. The PI has research experience in understanding the factors that shape economic recovery, and the phenomenon of jobless recovery has not been adequately studied. Empirical analysis of the causes and consequences of jobless recovery is difficult since recoveries from recessions are generally correlated with rebounds in job growth. The recovery from the "Great Recession" of 2008 is the most recent case of a jobless recovery.

In this project the PI will use rigorous econometric modelling to show that we don't have the faintest idea what is going to happen as we fully recover from the latest recession. This project will demonstrate important intellectual merit since it will lead to even more research funding.

This project is of broad and immense importance to domestic and international policy makers. Predictive tools developed with the econometrics modelling will be utilized by Department of Labor and IMF to decide economic and financial market policies that will lead to the next recession and a resulting rise in even more research funding opportunities.

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FAQs put to a Program Officer...

- Will this solicitation be fully funded (to the extent reported in the RFP)? How many awards are estimated for this fiscal year?
- I am a newcomer to this sub-discipline.... I have few (or zero) publications to my credit. Can I overcome this with a great project idea?
- Is the intent of the solicitation to fund more basic research, or will my applied research project idea be considered competitive? (...or vice versa)
- How specific do we need to be in describing the extension of this research to the classroom? Do we need supporting documents, e.g. proposed syllabi? Will outreach *outside* of the University be highly favored?
- Will collaboration with other disciplines outside of my discipline be favorable, or unfavorable?
- If this project does not fit the solicitation under discussion....please suggest another agency program & Program Officer to contact.
- (Anything that is unclear or vague in the solicitation... especially what constitutes an allowable direct cost, if there is any ambiguity.)

Suggested script for a Program Officer call...

Ring Ring...

PO: Hello?

PI: Hi, Dr. {zzz}, this is {xxx}. I'm calling about my proposal to the {ABC} program.

{Some getting-to-know-you chit-chat is good... do you have any mutual colleagues, mentors, etc.? "I see you went to Duke for graduate school..."}

PO: Well...great! I'm looking forward to learning more about your project.

PI: You've read my description in the email? Shall I expand that a bit for you?

PO: Yes, please go ahead.

PI: *{BRIEFLY summarizes the project, emphasizing the goals, the significance, and broader impacts.}* Do you have any questions, or comments? Is this a good fit for the {ABC} program?

PO: Yes, it seems to be a likely fit... but, are you sure that you can effectively weave this project into your undergraduate classes? It seems a little advanced.
{Or...react to the PI's project description.}

PI: *{Answer the questions as well as you can...don't fake it! If you don't have a ready answer, just state "Well, I'll have to think about that aspect."}*

Suggested script for a Program Officer call...continued

{LISTEN carefully to the PO's responses... your scribe is taking notes.}

PO: Now...do you have any questions for me?

PI: Yes... is collaboration with {yyy} discipline considered to be a benefit?

{Or... try out a question from the RFP you looked at earlier.}

{Again.... LISTEN carefully to the PO's responses. If anything is unclear to you in the PO's answers, ask in a different way for clarification. Rely on your scribe to take down all questions & replies so that you can listen effectively.}

PO: Well... have I answered all your questions? Can I do anything else for you today?

PI: I have a much better understanding of the {ABC} program now. I really appreciate your sharing of your time and expertise. Can I write you a summary email, and include any questions I didn't think of today?

PO: Yes... If I don't know the answers, I'll refer you to another Program Officer, Dr. Mike Krzyzewski. He also knows a lot about the {DEF} program, which might be another program you could consider.

PI: Thanks again for all your help... goodbye!