

## Contacting a Funding Agency for Advice

It is perfectly acceptable, and sometimes even wise, to call the funding agency you are interested in and discuss your idea before submitting a formal proposal. Here are some of the things you should consider talking to them about:

**When and How To Apply.** If you are not responding to a formal grant announcement, ask if this is a good time of the year to discuss a new idea. If not, ask if they have typical cycles and schedules for proposal receipt, proposal review, and proposal award, and when in that cycle it would be appropriate to call again. Ask if they are willing to respond to pre-proposals or informal letters of inquiry.

**Test The Feasibility of Your Idea.** Before you call, prepare a succinct written statement that gives a good overview of what you want to do: What question you will address, why this is important, and how you will go about addressing it. Use lay language, be sure you can read it in no more than 2 or 3 minutes. When on the phone, use this to describe your idea and: **(1)** Ask if something like this would be eligible. If not, ask if there are ways it could be altered to make it more appealing to them. **(2)** Ask if they can offer guidance on other foundations or agencies where you could submit a proposal.

**Learn Their Interests.** Ask if there are any thematic initiatives the foundation is pursuing at this time. Ask if there is anything you need to know that is NOT in the guidelines. This will give them an opportunity to tell you, e.g., what kind of work the agency prefers right now, or if there is a special initiative under way that is not referenced in the guidelines.

**Learn Their Procedures.** Ask what their typical proposals look like: What is the typical length, in pages? Ask if there are page limitations, and if so, do these include appendices, resumes, and budget pages. What is the typical budget request range? Ask about their proposal review process, e.g., a typical sequence might be that the program officer first reads the proposal and determines its eligibility. Then, it is mailed to a subject area specialist who rates its substantive and technical merits. Then, the proposals that pass these first two tests are reviewed by a governing board or committee of generalists who make the final selections. Are their readers specialists in the content area of the proposal or are they generalists?

**Learn What They Tend To Fund.** What kind of projects do they typically fund? What their overall program budget is, how many awards they typically make and how many they typically reject? Ask if you can look at a couple of examples of successful proposals or at least, can they give you the names and numbers of successful applicants.