



Recess Meeting Toolkit

“Recess” is the unofficial name for “district work period” – the time when members of Congress leave the Capitol and head home to meet with constituents and work from the district or state offices. NCAN encourages members to meet with their elected officials or invite them to attend program events during this time.

Meeting in “at home” provides several advantages:

- Ability to hold meeting with little to no travel costs
- Increases chance of student participation
- Emphasizes that your program is working to serve constituents of the elected official
- Possibility of more face time with the elected official

What are the benefits of meeting with your elected officials?

- Educate lawmakers about challenges students face and how they can help
- Build a strong relationship now to provide a foundation for future requests – either for policy action or for participation in your program (such as speaking at a Decision Day event)
- Develops your program brand, and NCAN’s, locally
- If meeting with a district staffer, they are most likely to know and understand the district

With whom should I meet?

- Senators from your state
- Representatives who have students you serve in their districts
- Aim for the elected official in person
 - It is within reason that the member will have time to meet when they are in the district/state during recess. We especially recommend requesting a meeting with the member themselves if you already have a relationship with him/her.
- Meeting with their staff is still beneficial for relationship building and can set the foundation for a future in person meeting or event attendance
 - Meetings with staffers can be easier to schedule and can have great impact, as staffers often have more expertise in specific subjects than their bosses, and their recommendations can go a long way. However, staffer schedules, like that of members’ can also be subject to sudden changes.

How do I schedule the meeting? (Sample on Page 6)

- For recess meetings, the district office manager or district scheduler is the appropriate point of contact for requesting a meeting. You should also CC the DC-based education staffer so they are aware of the request, and they may send along some resources to the district staffers to have on hand during the meeting.
- The best way to find this contact info is to visit Congress.gov or go directly to your elected official’s congress.gov webpage. The contact tab should include a DC office phone number and district office phone numbers. Calling to ask for the appropriate name **and email** will get you the right person fastest. If you are having trouble locating this information, you can also reach out to NCAN for help by contacting Carrie Warick at warick@collegeaccess.org.
- Please note you should EMAIL the staffers to ask for a direct meeting or EMAIL the scheduler to submit an official request for a meeting with the Senator or Representative.
- Follow up if you don’t receive a response after a week or so.

Preparation

Background Research (Sample included on page 5)

Prepare as much as possible for these meetings, so you can tailor your presentation and pitch to their interests and positions. Gather information such as:

- Policy Positions. Does your member have a position on higher education or introduced relevant bills? Find out by visiting their official website on Congress.gov, their campaign website, and by using the Congress.gov search for legislation by member option.
- Committee assignment. Members who serve on the education and the education appropriations committees (House Education and the Workforce Committee; Senate Health, Education, Labor and Pensions Committee; and both House and Senate Appropriations subcommittee on Labor, Health and Human Services, and Education) may have more knowledge on education than their peers, as they spend more time focusing on education issues.
- Population served. Does the member serve a large population of under-resourced students? Is it a primarily urban, rural or suburban district? Are the students you serve a majority or minority of the student body in the district?

What to Plan

You won't have a whole lot of time in the meeting, so make sure your presentation is concise and pitch is well-organized.

- Have your messages organized: Develop no more than three key messages for your meeting.
- Make it local: Bring students to share their stories or have a few prepared to share. Also consider having a Board member join you if possible.
- Use data: How long does it take your students to file FAFSA? Get through verification? How many FAFSAs does your program assist in filing annually? What percentage of your students receive Pell Grants? What percentage of your students go to college? Graduate from college? How does this compare to similar populations nationally or your community average?
- Have an "ask": What specifically are you asking the member to do? It could be related to policy or could be about participating in a program event such as FAFSA Night or Decision Day.
- Plan what you will say and who will say it: One person can introduce your organization and students while the other discuss policy solutions. Designate a note-taker.
- Learn Something: Don't forget that you can learn something in this meeting, too. Make sure to ask the member or staffer for their perspective on the issue—you can gain valuable insight.

What to Bring

Make sure you bring the following with you:

- Leave-behinds: You can bring materials about your program, relevant research, or a summary of what you hope to share. But be concise! Staffers are busy and likely won't read more than
- Business cards: You'll want to be able to leave a business card behind so that the staffer can contact you later with any follow-up questions.

What to Expect

Whether this is your first or fortieth meeting with a Member of Congress or a hill staffer, some things won't ever change:

- The meeting may start late, but you should show up on time. If you're late, be sure to call ahead.
- You meet with a staffer even if scheduled to see the member. This isn't a bad thing! Staffers often have more expertise in specific subjects, and their recommendations can go a long way.
- The staffer or member may need to multitask during your meeting. It may seem rude, but don't be offended if they are using their Blackberry or iPhone during the meeting.

How to Follow-Up

Follow-up is a critical last step in making a meeting successful.

- It's okay to not know the answer. Say you will follow up with the information later – and then do!
- Send a thank-you note or email shortly after your meeting.
- Offer yourself as a resource in the future—let them know they can count on you for information.

Meeting Worksheet

Organize yourselves and assign meeting roles:

Group Introduction: _____

Speaker by Topic: _____

Closing: _____

Note-taker: _____

Plan the order in which you will introduce yourselves, then introduce your organization and what you would like to share during the meeting.

***Example introduction:** Hello and thank you for your time today. We are here on behalf of [our organization] and the National College Access Network to discuss [your topics]. We would like to share our higher education priorities with you as well as the work we're doing to advance and support college affordability.*

Add the points to introduce your organization here. Be sure to be succinct and give specifics about: who, where, what and impact. Data always helps! Remember to make it local!

Identify who will deliver a short pitch for each ask addressing why it is important to your organization and how it ties to your work. Your overall pitch should be no longer than 3 to 5 mins.

Pro tip: Include local data and local stories.

- 1. FAFSA Simplification (more info at www.collegeaccess.org/fixfafsa)**

- 2. Pell Grant program funding (more info at www.collegeaccess.org/pell)**

- 3. Your Topic Here**

4. Closing:

Note Taking

During the Meeting:

Group/Participants:

Issues Discussed:

Key Takeaways:

Follow-up materials or information promised:

Post Meeting: Immediately after the meeting, while the dialogue is still fresh in your mind, it's crucial to reflect on a few important things in order to get the most out of it moving forward.

Did you find success in persuading individual?

What feedback or reaction did you get from the staffer/member?

What did you hear that surprised you, or that interested you?

Example Background Research

Senator Steve Smith

Senator Smith was first elected to the Senate in 1992 and currently serves as the Ranking Member on the Senate Health, Education, Labor and Pensions Committee.

Prior to his election to the Senate, he was a high school history teacher and served as a member of the local school board.

He is an alumna of the University of Texas and spent a decade teaching night classes at a nearby community college.

Senator Smith on Education:

Senator Smith supports expanding access to higher education and higher education affordability for all students. He has said that his guiding principle is that Federal dollars should go to where they are most needed – to students.

Senator Smith has helped to draft and pass several higher education bills to help students, including the Higher Education Opportunity Act (2008 HEA reauthorization), Ensuring Continued Access to Student Loans Act (2008), the College Cost Reduction and Access Act (2008).

He also cosponsored the In the Red Act of 2006, which would, among other things, address the loss in value of Pell grants by permanently adjusting them for inflation to keep pace with rising costs.

Staffer Info:

Edward Education, Education Legislative Assistant

Edward is a graduate of the Tufts University and received an MPA from Harvard University. Prior to working in the Senate, he worked in the House Ed Workforce Committee and for two non-profit organizations in his home state of Massachusetts.

What To Include In Meeting Request

- A greeting!
- Your name, your title, name and a brief description of your organization.
- Mention that you (and a colleague, if joining) would appreciate the opportunity to meet with the member while he/she is spending some time in the district during August recess to discuss issues related to [briefly mention of the issues you hope to discuss.]
- Include your range of availability
- Brief thanks for consideration of the request.

Sample Meeting Request

Sample Email Subject: Meeting Request

Good morning [Staffer First Name],

My name is [Name] and I am the [Title] at [Organization Name], which is focused on [helping students find an affordable path to and through postsecondary education in State]. We are [another descriptor—perhaps city location] and are also a member of the National College Access Network (NCAN), a Washington-based group dedicated to improving the quality and quantity of support that underrepresented students receive to apply to, enter, and succeed in postsecondary education.

[My colleague Name and] I would appreciate the opportunity to meet with [you / Rep. X / Sen. Y] to discuss [organization name] and NCAN's higher education priorities as well as the great work that our organization is doing to advance and support college affordability.

[Are you / might the Member be] available on [Wednesday, March 21] anytime between [10 am and 2 pm] to meet with my colleague and I?

Thank you for considering this request and we look forward to hearing from you.

[Best,
Name]