

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. The National College Attainment Network (NCAN) encourages our 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 a 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 in the district/state during recess. We especially recommend requesting a meeting with the member themselves if you already have a relationship with them.
- 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 a greater 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 Louisa Woodhouse at woodhouse@ncan.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 do not 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 Congress.gov to 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 primarily an 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 will not have a whole lot of time in the meeting, so make sure your presentation is concise and the 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 discusses policy solutions. Designate a note-taker.
- **Learn something:** Do not 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 could 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 will not read more than
- **Business cards:** You will 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 to note:

- The meeting may start late, but you should show up on time. If you are late, be sure to call ahead.
- You meet with a staffer even if scheduled to see the member. This is not 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 do not be offended if they are using their smartphone during the meeting.

How to Follow-Up

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

- It is 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 Attainment 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 three-to-five minutes.

***Pro tip:** Include local data and local stories.*

1. FAFSA Simplification (more info at ncan.org/fixfafsa)

2. Pell Grant program funding (more info at ncan.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 to get the most out of it moving forward.

- Did you find success in persuading the 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 class 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:

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