

## Consideration

- **Why do hill meetings?**
  - Expand your and NCAN's brands.
  - Build relationships.
  - Share info and stories that can educate and inform policymaking.
- **How many meetings should I aim to set up?**
  - You should try to hold meetings with the member that represents your district and ideally the two senators that represent your state as well.
- **Who should I meet with?**
  - **Staffer**- 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.
  - **Member** – It is within reason that the member will have time to meet when they in the district/state during August recess. We especially recommend requesting a meeting with the member themselves if you already have a relationship with him/her.
- **Who should I reach out to?**
  - For August 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.
- **How do I find this contact info?**
  - If you do not have this information on hand, please reach out directly to NCAN Advocacy Associate, Jack Porter at [porterj@collegeaccess.org](mailto:porterj@collegeaccess.org).
- **How should I reach out?**
  - While reaching out via phone is an option, email is the best way to reach out to the majority of offices.
- **When should I reach out?**
  - Early July would be an ideal time to reach out for meetings.
- **Is it ok to follow up if there's no response?**
  - Absolutely! If you have not heard back a week or so after sending your initial request, it is a great idea to reply and follow up on the meeting request so it doesn't get lost in inboxes.
- **How long will meetings last?**
  - Meetings will generally last 30 minutes, however, depending on the office and level of interest, meetings may run longer so it is a good idea to build in buffer time. There is no need to specify meeting length when you make a meeting request.

## Preparation

### What to Research

*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:*

- **Background.** Has your member facilitated or has your district put forth any efforts around higher education? Has the member taken interest in your issues or work before?
- **Committee assignment.** Members who serve on the education committees (House Education and the Workforce Committee; Senate Health, Education, Labor and Pensions Committee) may have more knowledge on education than their peers, as they spend more time focusing on education issues. Additionally, they likely have more of a voice in Congress on education issues.
- **Population served.** What is the makeup of the student body that your member serves? Does the member serve a large population of minority students, underresourced students who face challenges accessing postsecondary education or other special populations who face challenges in learning environments? Is it a primarily urban, rural or suburban district?
- **Positions.** Has the member introduced or co-sponsored any relevant education bills recently? Have they spoken out about any issues related to NCAN's policy agenda?

### Recommended sources for your research:

- Member's official website
- Member's campaign website
- Congress.gov (use option to search for legislation by Member, then issue area)

### 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. Everything in your presentation should come back to three key messages. What are those?
- Make it local! Stories about your students who have graduated from a local university or high school will ring true for the member and or district staffer. In fact, one of the benefits of conducting this sort of meeting is that the individual across the table will be more familiar with the community than the DC staffer perhaps would. Also, it doesn't hurt to bring one of your organization's board members if he/she has engaged in policy work within the community.
- What specifically are you asking the member to take action on? How will this actually help the member's own policy and political goals?
- If you are there with a colleague, plan out who will say what. For example, one person could be responsible for sharing the background on your organization, and the other for details about your policy recommendations and the actual ask. You should also designate a note-taker.
- Make sure your messages are embedded with real-life examples as well as facts and data (if possible) to back up claims.

- 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 into the timing of legislation, the member's position, and other helpful information.

### **What to Bring**

*Make sure you bring the following with you:*

- **“Leave-behinds”** You probably won't get a chance to share a lot of details at the meeting, so it's a good idea to bring research, a report/white paper, or a short fact sheet to leave behind. Make sure your recommendations are summarized on any leave-behind.
- **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 don't let that be your fault! Show up on time. If you're running late, make sure to call ahead.
- Don't be surprised if you end up meeting with a staffer and not the member. This isn't a bad thing! Staffers often have more expertise in specific subjects than their bosses, and their recommendations can go a long way.
- The staffer or member may be frazzled and running late. Be calm and appreciative of whatever time they can give you.
- 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 tell the staffer or member that you will get back to them on any information you don't know or have on hand. Just make sure you follow up later!
- Send a thank-you note or email shortly after your meeting.
- Offer yourself as a resource for the member or staffer in the future—let them know they can count on you for information about your area of expertise.
- Invite them or the Representative/Senator to your next event, to visit your organization, or to a school or college you work with in their state or district.

## Organization

**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!**

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**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 minutes. Where the two first asks are aligned to NCAN priorities, you should plan your specific pitch on the issue. On the third ask, pitch your top issue and rationale.**

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

**1. FAFSA Simplification**

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**2. Inflationary Adjustment for Pell Grant program**

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**3. Your organization's ask:**

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**4. Closing:**

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## Note Taking

### During the Meeting:

**Group/Participants:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Issues Discussed:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Key Takeaways\*:**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Follow-up materials or information promised:**  
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\_\_\_\_\_  
\_\_\_\_\_

**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]