



Maryland Banking School Advocacy and Leadership Project

As you continue to assume leadership positions within your bank and community, you will recognize the importance of communicating with your elected officials on the local, state, and federal levels of government. The actions of Congress, the Maryland General Assembly, and even your local city/county/town councils have a significant impact on the banking industry. There is no better time to learn how to get involved than now!

Your Leadership and Advocacy Project is to be completed no later than June 7, 2024. For your Project, please initiate one of the following activities:

Option 1

Participate in a MBA-sponsored event, and write a 2-3 page reflection paper on your experience.

Events include:

- **First Friday Economic Outlook Forum** – January 5, 2024 (estimated costs - \$250) – The First Friday Economic Outlook Forum showcases economic experts who will share valuable information about both current events and the future of the region's economy. Influential leaders in the business and political communities commonly attend.

- **MBA's Day in Annapolis** – January/February 2024 (estimated costs - \$179) – MBA's Day in Annapolis is an annual advocacy event focused on giving participants the opportunity to understand the importance of advocacy at the state level. Participants hear from leaders in the Maryland General Assembly on hot policy topics, develop a deeper understanding of the policy work happening within the MBA, and become better advocates for the banking industry here in Maryland.

- **MBA Attends ABA's Washington Summit** – March 18-20, 2024 (estimated costs - registration is free for ABA members, costs include travel and hotel expenses) – The American Bankers Association's (ABA) Washington Summit is a 3-day event aimed at expanding the banking industry's advocacy efforts. The Summit is a valuable opportunity to network with bankers from across the country, hear about key policy issues from the lawmakers who put them into action, and strengthen your federal advocacy skills.

- **MBA Attends ICBA's Capital Summit** – May 2024 (estimated costs – registration is free for ICBA members, costs include travel and hotel expenses) – The Independent Community Bankers of America's (ICBA) Capital Summit is the premier advocacy event for the community banking industry, offering the opportunity to interact with leading policymakers in Washington, D.C. and top policy professionals from ICBA. Join community bankers from across the country to advocate for the industry. You have the power to share your personal story and put a name to our industry's key legislative priorities.

Reflection Paper

If you attend the First Friday Economic Forum, your reflection paper should address:

- How you benefitted personally and professionally from the Forum
- What you learned about the industry and the economy that you did not know before
- How you think the Forum ties into MBA's advocacy work
- What information you would share with an elected official about how the banking industry and economy affect legislative policy

If you attend any of the other listed events, your reflection paper should address:

- How you benefitted personally and professionally from the event
- What you learned about the legislative process and advocacy during the event
- a legislative issue that MBA, or ABA/ICBA, is currently tracking and how it would impact your bank

Note: For non-Maryland based students, you may use an MBA issue and tell why its passage or defeat is important to your bank or why its passage or defeat is important to banking in general. You may also consider issues facing your state's legislature this year.

Option 2

Work with your bank's leadership team to organize an event with your elected officials that represent you in the Maryland General Assembly and write a 2-3 page reflection paper on your experience.

Examples of events include:

- **Branch Visit** – Invite your legislators to tour a branch of your bank and interact with your colleagues. This is an opportunity to explain how your bank is working with the legislator's constituents to help them meet their financial needs. Be sure to share data that shows the bank making a positive impact in the surrounding community.

- **New Branch Events** – Invite your legislators to attend the groundbreaking or the opening of a new bank branch. Set aside time with the legislator to talk about the benefits of the new branch, including job creation and expanded services. This is also a great opportunity for media exposure, so please invite local press.

- **Board Meetings** – Invite your legislators to attend a meeting of your bank's Board of Directors. This is a great opportunity for you and your bank's leadership to have intimate conversations with your legislator on how the bank serves the surrounding community.

- **Financial Literacy Events** - Invite your legislators to participate in an event where you bring financial literacy skills to young people, such as Teach Children to Save Day, so that they can see how your bank is committed to serving the needs of the community and specifically, of school-aged youth. If you have an in-school program, invite your legislators to see the program in action.

Note: Maryland is divided up into 47 legislative districts. Each district has one State Senator and three Delegates. You will want to invite legislators that represent a significant portion of your market. You can visit www.mgaleg.maryland.gov to find contact information for your legislators. If you have any questions about finding your legislators, contact MBA's Evan Richards by emailing erichards@mdbankers.com.

Reflection Paper

Your reflection paper should address:

- How you organized the event, including communication with your legislators
- What your objective was by inviting your legislators
- Issues that were discussed with your legislators and any potential outcomes
- The role that grassroots advocacy plays in the legislative process

Option 3

While Options 1 & 2 are preferred for this assignment, Option 3 will allow you to gain a deeper understanding of the rulemaking process for your bank's regulators.

Compliance is crucial for your bank to be successful, and this assignment will demonstrate the impact that the banking industry has on the development of rules and regulations.

For this Option, you will write a 2-3 page paper on a rule that has been finalized by one of your bank's regulators over the past five years. Your paper should address:

- The proposed or finalized rule and how it would impact your bank and your

customers

- Any background on how the rule was developed or why the regulator believed that the rule was necessary
- Feedback that was provided to the regulator by either ABA or ICBA (both associations commonly provide comment letters to regulators during the rulemaking process)

Tips for a Successful Advocacy and Leadership Project

A successful project is crucial for your Maryland Banking School experience. As you complete your project, please keep the following tips in mind:

- **Thoroughly Complete Your Written Assignment** – Make sure that your final paper meets all listed requirements before submission. Your grade will reflect whether you covered the requirements.
- **Use MBA's Government Affairs team as a Resource** – MBA's Government Affairs team is constantly engaging with lawmakers and regulators, representing the interests of the banking industry. If you are struggling with your project and have exhausted resources available to you, please feel free to reach out to either Drew Jabin or Evan Richards. They would be more than glad to provide you with guidance on how to address the problems you are facing.

Drew Jabin – VP, Head of Government & Community Affairs – djabin@mdbankers.com
Evan Richards – Manager, Government Affairs – erichards@mdbankers.com

- **Finally, Have Fun and Be Creative!**

As a reminder, your project is due

June 7, 2024. If you have any questions about this assignment, please contact MBA's Ann DeVilbiss at adevilbiss@mdbankers.com or 443-837-1606.