

**ADVANCEMENT COMMITTEE**

**MARCH 7, 2025 – 8 AM VIA ZOOM**

**In Attendance:**

Mr. Mark Potter, Committee Chair

Ms. Marion Mullauer, Board Chair

Mr. Craig Ballew

Ms. Karen Malinowski, 2nd Vice Chair

Mr. Rob Hair, MSB Superintendent

Ms. Marlo Jacobson, MSB Advancement Department Director

Ms. Kibian Vazquez, MSB CFO

Ms. Valerie Johnson, MSB Executive Assistant

**Absent:** Mr. Bob Travers

**Call to Order:** Mr. Mark Potter convened the meeting at 8 am.

**Advancement Reports**: Ms. Marlo Jacobson presented the following Advancement Department Reports:

**Overview of the Current Programs and Goals:** Ms. Jacobson's commented that the Advancement Department is on track to meet the annual goals by the end of the fiscal year and potentially exceeding them.

**See Beyond Festival Update:**

* A rain plan has been developed.
* The media push for the event includes a more interactive and fun approach to social media promotion, such as sharing videos of activities.
* Informing local schools about the festival to encourage their families to attend.
* The focus of the festival is fostering understanding and appreciation for people with disabilities among children and adults. The activities are designed to convey the message that adapted activities are not necessarily easy and to showcase the capabilities of students with disabilities.

**Logo Rebranding:** Ms. Jacobson proposed a rebranding for the school, stating that the current logo does not fully represent the school’s identity. She suggested that the Advancement Committee consider this rebranding effort to better align with the school’s mission and vision.

After discussion, Ms. Jacobson will prepare a presentation on the potential rebranding for the logo and the school’s visual identity as well as the present logo being made accessible for the Committee to consider at the next meeting.

**MSB Board Talking Points:** Ms. Jacobson commented that the Board talking points should include the following:

* **Strategic Plan and Communication:** Emphasized the importance of aligning the Board's talking points with the new strategic plan. She suggested that the talking points should effectively communicate the organization's goals, vision, and future growth to various stakeholders.
* **Conciseness and Clarity:** She highlighted the need for concise and clear messaging, likening it to an "elevator speech." She proposed breaking down the key points into two or three sentences that board members could quickly share when discussing the school.
* **Focus on the Future:** She commented that the talking points should reflect the future direction and development of the organization, as outlined in the strategic plan. This includes communicating the progress and vision for the school.

Ms. Jacobson will work with the Board to refine the talking points and ensure they align with the strategic plan and the organization's overall messaging.

**Strategic Plan Roll-Out:** Mr. Rob Hair's comments regarding the strategic plan roll-out focused on the following points:

**1**. **Transparency and Public Information:** He emphasized that the financial information included in the strategic plan rollout, such as the $21 million surplus, was already publicly available and part of legislative reports. He clarified that this information is regularly shared with the state, including the budget committees and the IAC, as part of the school's transparent communication practices.

**2**. **Advocacy and Relationships:** He highlighted that the school's transparent approach to sharing financial data has not hindered its ability to advocate for funding. Instead, it has helped build trust and strong relationships with legislators and other stakeholders.

**3**. **Strategic Plan Goals:** He pointed out that the financial details were included in the roll-out to demonstrate progress against the strategic plan's goals, such as improving the school's financial position and increasing the endowment.

Following Mr. Hair’s presentation, concerns were raised about including financial details, such as the $21M surplus in communications like the strategic plan roll-out. It was felt that presenting this information could make the school appear "cash rich," potentially undermining legislative funding advocacy efforts, especially during Maryland's sensitive budgeting period. An emphasis was placed on being cautious with how financial data is shared publicly to prevent misinterpretation by stakeholders or legislators.

Mr. Potter emphasized the importance of financial transparency as a nonprofit, noting that it builds trust with donors and stakeholders. However, he suggested that while transparency is essential, it should be balanced with strategic communication to align with the organization’s goals and advocacy efforts.

Mr. Hair acknowledged the concerns raised about sharing financial details and clarified that the financial data was not included in materials sent to legislators as part of the strategic plan roll-out. He reassured the Committee that legislators are already informed about the school's financial position through official reports submitted as part of routine disclosures. He emphasized that while transparency is important, the information shared was intended for internal planning and stakeholder engagement rather than direct advocacy efforts with legislators.

A request was made to provide a report to the Committee regarding the Advancement Department’s expenses and revenues over the past five years. Mr. Hair will provide this to the Committee.

**Adjournment:** A motion was made by Mr. Potter and seconded by Ms. Mullauer without objections. The meeting adjourned at 8:50 am.

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