APPROVED

# Salem Academy Charter School

## Minutes

### Development Committee Meeting

**Date and Time**
Wednesday July 1, 2026 at 8:00 AM

**Location**
Zoom: https://salemacademycs.zoom.us/meeting/register/OSEL6L1OT2C6nQ-O8wh_pg

The Salem Academy Charter School Development Committee will meet at 8:00 AM.

**Committee Members Present**
Giselle Ortega (remote), Laurie Kennedy (remote), Nohara Lopez-Okoli (remote)

**Committee Members Absent**
*None*

**Guests Present**
Fallon Burke (remote)

**I. Opening Items**

A. **Record Attendance**

B. **Call the Meeting to Order**

Laurie Kennedy called a meeting of the Development Committee of Salem Academy Charter School to order on Wednesday Jul 1, 2026 at 8:06 AM.

### C. Approve Minutes

Nohara Lopez-Okoli made a motion to approve the minutes from Development Committee Meeting on 04-01-26.
Giselle Ortega seconded the motion.
The committee **VOTED** unanimously to approve the motion.

### D. Approve Minutes

Nohara Lopez-Okoli made a motion to approve the minutes from Development Committee Meeting on 05-06-26.
Giselle Ortega seconded the motion.
The committee **VOTED** unanimously to approve the motion.

## II. Development

### A. Development Report & Campaign Updates

Fallon Burke presented the Development Report as of June 25, 2026, and provided an update on year-end fundraising.

As of June 25, the Annual Fund had raised $135,346.03, exceeding the FY26 fundraising goal. Fallon noted that the report would be finalized after reconciling year-end gifts and recording the remaining donations received before the close of the fiscal year.

Fallon will distribute the finalized FY26 Development Report to committee members after year-end reconciliation is complete. No further action is needed from committee members.

Following the development report, the committee transitioned to discussion of the upcoming Development Retreat.

### B. Development Retreat Planning

The committee discussed plans for a summer Development Retreat and reviewed potential meeting dates. The committee scheduled the Development Retreat for Wednesday, August 12, 2026, from 9:00 a.m. to 12:00 p.m.

The committee discussed potential agenda topics for the retreat. Laurie recommended reviewing FY26 fundraising campaigns and year-end giving data to help inform the FY27 Annual Fund goal and broader development priorities.

The committee also discussed professional development interests, with Nohara expressing interest in grant writing training.

Proposed agenda topics for the retreat include:

- Review of progress toward FY26 development goals and draft FY27 development goals, including the FY27 Annual Fund goal.
- Discussion of development-related topics for the full Board retreat.
- Review of Board Evaluation Survey results related to development and fundraising.
- Planning for collaboration with the Foundation Board, including a fall Lunch & Learn.

No further action is required at this time.

**C. Progress Toward 2026 Committee Goals**

The committee conducted a brief review of progress toward its FY26 goals. No action was taken.

- Goal 1 – Annual Fund: The committee noted that the FY26 Annual Fund goal has been met and exceeded, with more than $135,000 raised as of June 30, 2026.
- Goal 2 – Foundation Board Collaboration: The committee discussed plans to reschedule the Foundation Board Lunch & Learn for the fall. Members agreed to continue planning this initiative during the August Development Retreat.
- Goal 3 – Prospect List: The committee acknowledged that additional work remains to further develop and refine the committee's prospect list. This topic will continue into FY27.
- Goal 4 – Recurring Donors: The committee met its goal of increasing recurring giving, noting that two trustees enrolled as recurring donors during the fiscal year.
- Goal 5 – Committee Recruitment: The committee briefly discussed recruitment efforts and agreed that recruiting additional committee members will remain a priority moving into FY27.

A more comprehensive review of progress and discussion of FY27 priorities will take place during the August Development Retreat.

**D. Reach the Beach Planning**

The committee began planning for the 2026 Reach the Beach fundraiser and discussed several strategies to strengthen sponsorships, family engagement, and event promotion. No formal action was taken. Fallon Burke will draft the 2026 Reach the Beach sponsorship packet and share it with the committee for review.

The committee agreed to maintain the $5,000 sponsorship level in the sponsorship packet for the upcoming event. Members also discussed increasing outreach to families by including Reach the Beach information in summer communications and encouraging

families to identify employers or community connections that may be interested in sponsoring the event.

To support future sponsorship cultivation, the committee discussed adding a question to the annual family survey asking where parents and guardians work, citing similar practices used by other charter schools to identify potential corporate partners.

Looking ahead to the fall, the committee discussed additional promotional opportunities, including October parking lot fundraising activities and the possibility of displaying a promotional banner across Essex Street or on the school building to increase community visibility.

## III. Closing Items

### A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 8:44 AM.

Respectfully Submitted,
Fallon Burke

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**Documents used during the meeting**

- Development Reports FY26 - 6.25.26.pdf
- RTB Sponsorship Packet 2025.pdf