APPROVED

Salem Academy Charter School

Minutes

Development Committee Retreat

Date and Time
Wednesday August 12, 2026 at 9:00 AM

Location
Salem Academy Charter School
45 Congress St.
Salem, MA 01970

The Salem Academy Charter School Development Committee will meet at 9:00 AM.

Committee Members Present
Giselle Ortega, Laurie Kennedy, Nohara Lopez-Okoli

Committee Members Absent
None

Ex Officio Members Present
Stephanie Callahan

Guests Present
Fallon Burke, Kara McLaughlin

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 Aug 12, 2026 at 9:23 AM.

C. Approve Minutes

Nohara Lopez-Okoli made a motion to approve the minutes from Development Committee Meeting on 07-01-26.
Giselle Ortega seconded the motion.
The committee **VOTED** unanimously to approve the motion.

II. Development

A. Welcome & Reflection

Laurie Kennedy and Fallon Burke welcomed members to the Development Committee Retreat and opened with a reflection on the committee's progress and development work over the past year. The retreat was intended as an opportunity for strategic planning and discussion; no action was taken.

Committee members reflected on what they are most proud of from FY26. Nohara Lopez-Okoli expressed appreciation for Fallon's work and highlighted the success of the REACH for College Gala as an example of seeing the results of the committee's efforts. Giselle Ortega shared that she is proud to be part of the Salem Academy community and encouraged the committee to continue considering what it wants others to see and understand about the school as its development efforts grow.

Stephanie Callahan reflected on the progress made in building and strengthening development systems. She noted that the school is moving from establishing processes toward stabilizing and institutionalizing them, with clearer trackers, goals, and systems providing direction. This progress creates an opportunity to focus more intentionally on what comes next rather than determining the direction of the work at each step.

The committee also reflected on the growth of the REACH for College Gala. Members noted that the event had a different atmosphere this year and felt increasingly established and successful. Stephanie highlighted greater clarity around the respective roles of the Board, Development Committee, and staff, as well as successes such as securing Platinum-level sponsorship. Giselle noted increased sponsor participation and greater comfort and engagement among trustees.

Laurie observed that Salem Academy's development program has built greater credibility and that trustees are increasingly asking questions and engaging with fundraising activities. Fallon agreed, noting that the full Board's increased engagement reflects a

deeper understanding that development is a shared responsibility rather than solely the work of staff or the Development Committee.

The discussion also touched on growing engagement from the Foundation Board. Laurie noted that Foundation Board members are becoming increasingly inquisitive about the school's Annual Fund work, creating an opportunity for deeper collaboration moving forward.

B. FY26 Review

Fallon Burke presented the Development Report as of June 30, 2026, reviewing FY26 fundraising results, campaign performance, and donor engagement. The discussion provided committee members with an opportunity to reflect on the year's results, identify lessons learned, and consider opportunities to strengthen the development program moving forward. No action was taken.

Laurie Kennedy encouraged the committee to consider the return on investment of the school's various fundraising activities and whether there are efforts that require significant staff capacity without generating sufficient financial or engagement returns. The committee discussed the importance of looking beyond overall campaign totals to better understand the composition of giving, including Gala sponsorships, individual Reach the Beach gifts, recurring donors, and one-time donors.

Fallon highlighted opportunities to increase capacity by engaging trustees and committee members more directly in stewardship activities, such as writing donor thank-you notes.

The committee discussed opportunities to better understand and segment Salem Academy's donor base, including identifying who gives across multiple campaigns, who gives once, and where there may be opportunities to convert donors to recurring or broader Annual Fund support.

Members also discussed the respective roles of the Development Committee and Foundation Board and the importance of engaging both groups strategically without duplicating efforts.

Stephanie Callahan noted that the Foundation Board has been effectively leveraged for prospect identification and donor stewardship and that there may be opportunities to further define how each group supports prospect development and fundraising.

The discussion also explored opportunities to strengthen longer-term donor engagement, including legacy giving and increased outreach to donor-advised funds (DAFs). One potential strategy discussed was developing collateral that could be shared with DAF-sponsoring organizations to increase awareness of Salem Academy as a potential charitable recipient.

The committee identified parents of alumni as another constituency with whom the school often loses contact after graduation. Members discussed opportunities to maintain those relationships through targeted engagement, such as a dedicated event for alumni families or an annual impact communication highlighting what their past support has helped make possible.

C. FY27 Development Priorities & Goals

The committee reviewed progress toward its FY26 Development Committee goals and discussed which priorities should continue or evolve for FY27. The discussion focused on identifying goals that reflect the committee's collective work, as well as measures of success beyond total dollars raised.

Kara McLaughlin, Board Chair, joined the meeting at 10:15 a.m.

Members discussed establishing a professional development goal for the committee, potentially participating in three learning opportunities throughout the year on topics such as grant writing and other areas that would strengthen members' ability to support the school's development work.

The committee also discussed identifying additional key performance indicators beyond the Annual Fund goal. Potential measures included growth in the donor base, recurring donors, donor retention, and other engagement metrics. Members expressed interest in selecting a specific non-financial KPI to prioritize and track during FY27.

The committee discussed continuing its goal related to cultivating prospective supporters through a recurring "friendraiser." Stephanie Callahan suggested connecting the event to an existing student-centered activity, such as a Service-Learning event, or other opportunities that allow prospective supporters to experience Salem Academy directly.

Kara noted that these events could introduce community members who may ultimately support Salem Academy through their time, talent, or financial resources. Members discussed developing a repeatable structure that could become an annual engagement opportunity rather than creating a new event each year. The committee will revisit this topic at its next meeting and identify existing school events that could align with the concept.

Additionally, the committee discussed considerations for establishing the FY27 Annual Fund goal, including the timing of gifts received around the fiscal year transition, the distinction between renewable and one-time revenue, and the broader philanthropic environment.

Nohara Lopez-Okoli suggested considering approximately 10% growth over FY26. Laurie encouraged the committee to first identify revenue that may be at risk before determining an appropriate growth target. Stephanie Callahan noted that approximately $22,000 in donor-advised fund giving represents one of the larger areas of uncertainty for FY27. Kara recommended further analyzing the composition of the school's donor base, including which donors and revenue sources account for the largest share of Annual Fund giving.

The committee also discussed opportunities to use more personalized appeals, including asking returning donors to consider increasing their previous gift. Stephanie noted that approximately $50,000 of Annual Fund revenue comes from sponsorships, reinforcing the importance of considering the sustainability and growth potential of individual campaign revenue.

Members discussed establishing a tentative FY27 Annual Fund goal of $150,000 and using early Reach the Beach results as an indicator of fundraising performance before finalizing the goal at the end of September.

Stephanie and Fallon also shared that Salem Academy has secured approximately $70,000 in state earmarks. The committee briefly discussed a question raised by the Finance Committee regarding staffing and the potential value of developing an ideal staffing model for longer-term planning.

In regard to FY27 campaigns, the committee received an update from Fallon Burke on Reach the Beach, including the possibility that the Ragnar relay could be canceled by the race organizer. The committee discussed how Salem Academy could pivot the campaign if the relay does not take place while maintaining the campaign's focus on student connection, wellness, and belonging.
Members discussed broadening campaign messaging so that fundraising is not dependent on participation in a specific race. Potential alternatives included participating in another race, such as the Wicked Half Marathon. Kara asked whether a different race could also create opportunities to engage a larger pool of runners and fundraisers.

The committee also discussed whether the campaign could evolve into a broader wellness-focused weekend, potentially incorporating activities such as yoga or spin. Members considered whether these additional activities would generate sufficient participation and fundraising return to justify the additional effort.

D. Committee Roles & Responsibilities

The committee did not discuss committee roles and responsibilities in depth during the retreat. Fallon Burke directed members to resources included in the meeting packet that provide additional examples of the role of the Development Committee.

E.

Board Retreat Preparation

The committee discussed potential content for the Development Committee's portion of the upcoming full Board Retreat. Members considered how the retreat could strengthen trustees' foundational understanding of development while connecting the discussion to broader Board development priorities.

Kara identified several broader retreat needs, including reviewing Board Self-Assessment results, deepening trustees' understanding of the full annual Board cycle, and helping each committee establish a more intentional calendar of recurring activities.

For the development portion of the retreat, members discussed whether and how to incorporate the development-related Board Self-Assessment results. Laurie Kennedy suggested that a detailed review of the assessment results could take place later in the year. For the retreat, she recommended focusing more explicitly on building foundational understanding of Salem Academy's development program and the Board's role within it.

Based on that discussion, members identified several potential topics for the Development Committee's portion of the retreat: an overview of Salem Academy's development program and revenue sources; a "Giving at a Glance" review showing how different fundraising activities contribute to revenue; clarification of staff, Development Committee, and full Board roles; FY27 development priorities; and expectations for trustee engagement.

The committee also discussed sharing a development timeline and visual chart to help trustees understand the annual fundraising cycle and how various campaigns and activities fit together.

F. Next Steps & Action Planning

The committee briefly reviewed next steps and identified topics requiring continued discussion following the retreat. Members agreed that agenda items that were not addressed in depth during the retreat will be carried forward to the next Development Committee meeting.

As this was a strategic planning retreat, no formal action was taken. Outstanding discussion items will be added to the agenda for the next committee meeting.

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 12:07 PM.

Respectfully Submitted,
Fallon Burke

Documents used during the meeting

- Development Committee Retret Note Catcher 8.12.26.pdf
- Annual Fund Campaign Totals FY21-FY26.pdf
- Development Reports FY26 - 6.30.26.pdf
- Development Committee Goals 2026.pdf
- Development Reports FY27 - 7.31.26.pdf
- Grant Descriptions + FY27 Expenditures.pdf
- Development Roles + Responsibilities List (BoardOnTrack).pdf
- SACS_Board_Job_Descriptions_and_Time_Estimates_6.11.26 - Dev Com.pdf
- Board Assessment Results for Dev Com Retreat 8.12.16.pdf