

**SARASOTA MILITARY ACADEMY  
BOARD OF DIRECTORS  
Tuesday May 10, 2022**

- Call to Order
- Pledge of Allegiance
- Approval of the Minutes-Tab 1
  - April 12, 2022
- Executive Director of Schools' Report Tab 2
- Head of School Report – SMA Prep Tab 3
  - Athletic Director Report
  - Faculty Representative
- Head of School Report – SMA High Tab 4
  - Athletic Director Report
  - Faculty Representative
- SAI/Commandant's Report Tab 5
- Treasurer's Report Tab 6
  - Monthly Financial Report
  - Fund Reserve Approval
- SMA Foundation, Inc. Report Tab 7
- Committee Report
  - Nominating Committee
  - PTCC Committee Report
- Chairperson's Report
- New Business
  - Board Terms
- Old Business
  - Draft CEO Evaluation
- Public Comment
- Meeting Adjournment

# **Sarasota Military Academy**

## **BOARD OF DIRECTORS**

### **MEETING MINUTES**

**12 APRIL 2022**

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#### **Board of Director Members' Attendance**

##### **Present:**

Thomas J. McElheny, EdD, CAPT, USMC (Ret), Chair

Ben Knisely, COL USA (Ret), Secretary

Dr. Brian Crupi, LTC, USAR

Ms. Erica Gregory, Lt Col, USAF (Ret)

Ms. Linda Long

Mr. Pete Skokos

Ms. Tessa Suplee, Lt Col, USAF (Ret) (Virtual)

Mr. Jim Tollerton

Howard G. Crowell, Jr., LTG USA (Ret), Chair, SMA Foundation Inc.

Mr. Rafael Robles, Executive Director, SMA Foundation Inc.

**Absent:** Mr. Scott Lempe, Lt Col, USAF (Ret), Treasurer; Ms. Cynthia West, RN Lt, USA (Ret); SMA-LTC Caitlin West, Assistant Head of School, High School; SMA-LTC Abby Williams, Assistant Head of School, High School; MAJ Clarence Arrington, Senior Army Instructor; SMA-MAJ Charlie Carver, Athletic Director, High School; SMA-LTC Lisa Currie, Assistant Head of School, Middle School; SMA-LTC Ryan Lee, Assistant Head of School, Middle School; SMA-MAJ Leslie Smith, Athletic Director, Middle School

##### **SMA Administrative Staff in Attendance:**

SMA-COL Christina Bowman, Chief Executive Officer

SMA-LTC Steve Kok, Director of Finance

SMA-COL Frederick Fout, Head of School, High School

SMA-COL Tom Vara, Head of School, Middle School

MAJ Becky Morris, Assistant Head of School, Middle School

**Guests in Attendance:** Ms. Susan Hartman, PTCC President; Ms. Jeanine Signorelli; SMA-MAJ Michael Finley, Music Department; SMA-CPT Jeanette Marks, Marine Science, High School

Location: SMA High School

The chair called the meeting to order at 2:31 pm. Everyone in attendance stood for the Pledge of Allegiance.

**Motion to Approve the 12 March 2022 Minutes:**

COL Ben Knisely motioned to approve the 12 March 2022 minutes; Mr. Jim Tollerton seconded the motion and the board unanimously approved.

**Executive Director of Schools Report:** SMA-COL Christina Bowman provided a read-ahead report. She discussed the current enrollment numbers for next school year on both campuses. SMA-COL Bowman mentioned a successful visit from Sarasota County board member candidate, Dawnyelle Singleton, as she enjoyed formation and meeting the cadets. She stated that Ms. Singleton accepted an invitation to join the high school staff meeting virtually for an introduction along with a Q&A.

SMA-COL Bowman stated that the route coordinator, SMA-CPT Beth Harris, was able to reassign bus stops to accommodate a second Manatee County bus for the middle school and mentioned that our bus drivers are currently paid higher than the county. She mentioned receiving incremental funds from the ESSER grant. Chair Thomas McElheny inquired to the funds being used for teachers and their salaries in which SMA-COL Bowman replied that required proof of funds used will not allow distribution towards teacher's salaries.

**SMA Head of School Report, Middle School:** SMA-COL Tom Vara provided a read-ahead report. He discussed a successful spring dance and the completion of first part of FSA writing. SMA-COL Vara commended all who participated in a great Raiders Rise and Run Event with over 400 participants and proceeds benefit both high and middle school Raiders teams.

**SMA Middle School Athletics Report:** N/A

**Technology and Data Impact Report:** N/A

**Instructional Design & Curriculum:** N/A

**SMA Head of School Report, High School:** SMA-COL Fred Fout provided a read-ahead report. He commended the testing coordinator, SMA-CPT Alex Teicheira, for managing a busy testing schedule. SMA-COL Fout stated both Raiders teams had a great time rappelling at the 40ft. wall at Booker High School. COL Knisely inquired as to a new Commandant in which SMA-COL Bowman replied that the SAI will finish the year and going forward will depend on the budget and numbers.

**SMA HS Athletics Report:** N/A

**SAI/Commandant's Report:** MAJ Clarence Arrington provided a read-ahead report.

**Staff Representatives:** N/A

**Media Report:** N/A

**Treasurer's Report:** SMA-LTC Steve Kok provided a read-ahead report. SMA-LTC Kok discussed the profit and loss for both campuses. Chair McElheny discussed of a meeting with Wells Fargo and Mr. Scott Lempe, SMA-COL Bowman, and SMA-LTC Kok to discuss future banking with Wells Fargo.

**PTCC Report:** Ms. Susan Hartman provided a read-ahead report. She introduced Ms. Jeanine Signorelli as the new PTCC president for 2022-23. Ms. Hartman discussed filling the available

board positions as well as awarding twenty-two (22) grants for the year thus far. She provided the upcoming events on both campuses and will present a year-end info graph at the next board meeting. Ms. Hartman provided a list of recommendations to include the increase of volunteer participation and registration and to record volunteer hours. Chair McElheny complimented and thanked Ms. Hartman for her tremendous effort and volunteer and inquired as to what the board can further do in which Ms. Hartman replied that having board members on campus and events means a lot to cadets and staff.

**Foundation:** Mr. Rafael Robles provided a read-ahead report. He discussed the financials including total donations and expenses thus far. Mr. Robles stated he rekindled a relationship with a past donor who extended two scholarships for two cadets who have committed to attending Florida State University. Mr. Tollerton inquired as to the status of the New College of Florida partnership in which SMA-COL Bowman replied that the technology department is currently working with New College. Mr. Tollerton inquired as to presenting a list of seniors and the schools they are attending at the next board meeting.

Mr. Robles discussed upcoming events with an alumni reunion for the classes of 2011 and 2012 on 22 April and the Giving Challenge at noon on 26 April thru noon on 27 April. He stated that emails with more information would go out to discuss the instructions for the peer-to-peer campaign. Mr. Robles stated that the goal is 35K unmatched and has a donor who will also match the match at the first 10K.

Mr. Robles discussed the 20<sup>th</sup> Anniversary Gala on 25 March 2023 with a venue to be determined. He stated he is currently looking for co-chairs of the committee who has community connections. Ms. Signorelli stated she could pass the contact information of someone she knows at the Sarasota Art Museum. Mr. Robles presented a copy of the SRQ Magazine brand story consisting of a 4-page spread and the video compiled by SRQ Media should be complete by graduation. Chair McElheny commended Mr. Robles for assisting in the recreation of SMA's image in Sarasota.

**Marketing and Communications Report:** N/A

**Long-Range Planning Committee Reports:** Mr. Tollerton stated that resources within the SMA Administration and the PTCC has assisted in creating the committee. He stated that land sites the school board may have available will be presented at the next board meeting. Chair McElheny stated that land acquired by the county could be released to a charter school by lease or own.

**Chair:** Chair McElheny recommended Mr. Scott Lempe as the new Vice Chair.

**Ms. Linda Long motioned to approve Mr. Scott Lempe as the new Vice Chair; COL Knisely seconded the motion and the board unanimously approved.**

Chair McElheny recommended every meeting start with SMA's vision, mission statement and reviews of fiscal health, FTE stabilization and expansion, vision statement of what we are going to be at the school, and increase school grade. He inquired to the board as to what they would like to see as a high school and middle school as part of the strategic vision.

**CEO Evaluation:** N/A

**Old Business:** Chair McElheny asked of the board to review the CEO evaluation and provide feedback to SMA-COL Bowman prior to next board meeting. He stated that the timeline is to start the new year with goals and objectives. Mr. Tollerton stated that the goals and objectives of the CEO need to tie in with the vision and mission statements. COL Knisely recommends that the CEO do the evaluations of the heads of schools in which SMA-COL Bowman replied that she follows the PRIDE evaluation that includes her evaluation and the scores of cadets. Ms. Long inquired if that can be shared with the board in which SMA-COL Bowman replied that it could. Ms. Erica Gregory inquired on presenting more information on the process of increasing the school grade. Dr. Brian Crupi inquired as to holding a golf tournament in which Chair McElheny replied that Dr. Crupi and Ms. Tessa Suplee could take the lead. Chair Howard Crowell stated that the SMA Foundation Board of Trustees meeting is 27 April.

**New Business:** Mr. Tollerton inquired as to the feasibility of adding the junior achievement program in which SMA-COL Bowman replied that it could be incorporated into 9<sup>th</sup> grade.

**Public Comments:** MAJ Becky Morris presented sixth grade enrollment numbers and asked the board to consider weekly reports. SMA-COL Bowman stated that she could scan the report and email to the board.

The next board meeting will be on 10 May 2022 at 4:30pm at the High School campus.

The chair adjourned the meeting at 4:07 pm.

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Dr. Thomas McElheny, Chair

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Date

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COL Ben Knisely, Secretary

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Date

## Executive Director of Schools Report

May 10, 2022

### **Enrollment:**

- 2021-2022 Enrollment Overview Provided
- 2022-2023 Open Enrollment
  - Update Will Be Provided

### **HR:**

- Academy- Bus Drivers

### **Strategic Plan:**

- College, Careers and Citizenship
  - Acquire and retain quality staff
    - 2015-2016—81%
    - 2016-2017—81%
    - 2017-2018—78%
    - 2018-2019—79%
    - 2019-2020—88%
    - 2020-2021—84%
    - 2021-2022—94%
    - National Average—84%
- Resources
  - Increase retention of rising 9<sup>th</sup> Graders by 5% each year for the next five years
    - 2014-2015--75%
    - 2015-2016--72%
    - 2016-2017--68%
    - 2017-2018--65%
    - 2018-2019--65%
    - 2019-2020--54%
    - 2020-2021—48%
    - 2021-2022—57% (Goal 53%)
  - Increase High School enrollment by 25 FTE's each year for the next five years
    - Current HS enrollment—640
    - Goal for SY 2022-2023—665
      - Target—700
    - Current MS enrollment--534
    - Goal for SY 2022-2023--600

### **Communication/Community Outreach:**

- HS Graduation
  - May 20, 2022
  - 7:00pm-9:00pm
  - Bayside Community Church
  - 15800 FL-64 Bradenton, FL 34212
- Middle School Promotion
  - May 24, 2022
  - 6:00pm-8:00pm
  - Bayside Community Church-Bee Ridge Campus 8200 Bee Ridge
- Bi-monthly Academy Administrative Team Meetings
- Weekly Briefings Continue
- "Good News" Report;
- Next Meeting: June 14, 2022 4:30 pm Middle School Campus

SIS Live.

SIS &gt; Enrollment &gt; View

[Options](#) | [H](#)

## Enrollment by Race

## Majority/Minority Section

Grade Level	Majority		Minority		Total
	MALE	FEMALE	MALE	FEMALE	
06	50	35	47	44	176
07	52	30	53	36	171
08	57	47	50	33	187
09	64	25	49	29	167
10	55	27	42	41	165
11	53	21	60	36	170
12	40	26	34	38	138
TOTAL	371	211	335	257	1174

A - ASIAN(OLD PACIFIC ISLANDER), Minority

B - BLACK/AFRICAN-AMERICAN, Minority

I - AMERICAN INDIAN/ALASKA NATIVE, Minority

P - NATIVE HAWAIIAN / PACIFIC ISLANDER, Minority

W - WHITE, Majority

## Primary Race Section

Grade Level	MALE						FEMALE					Total
	I	A	B	H	M	W	A	B	H	M	W	
06		2	1	37	7	50	1	1	37	5	35	176
07	1	3	2	46	1	52		3	29	4	30	171
08		4	2	37	7	57		5	26	2	47	187
09			9	38	2	64	1	3	24	1	25	167
10		1	7	31	3	55		3	33	5	27	165
11	1	5	4	45	5	53		7	28	1	21	170
12			3	27	4	40	2	4	32		26	138
TOTAL	2	15	28	261	29	371	4	26	209	18	211	1174

## Head of School Report for

April, 2022

### **Enrollment**

Grade 6: 176

Grade 7: 171

Grade 8: 187

Total: 534

### **Campus Life/Events**

- 4/1-Wear Blue-Child Abuse Prevention
- 4/6-Blood drive on Prep campus
- 4/7-Dress Down Day for blood drive
- 4/7-Girls soccer awards
- 4/8-College shirt day
- 4/12-Board Meeting @ high school- 2:30 pm
- 4/15-No School
- 4/18-4/21-Campus book fair hosted by the PTCC
- 4/21-Purple up for children of Veteran's
- 4/22-Campus lockdown drill period 5
- 4/26-Prep drumline performed at formation
- 4/27-1/2 day for cadets
- 4/27-8<sup>th</sup>-grade class picture
- 4/27-School theater play: Alice in Wonderland
- 4/28-Fire drill at the end of period 3
- 4/29-Tie dye t-shirt for 8-grade Gradventure trip

### **Cadet Highlights**

-Cadets of the Month for **April:**

English:	Ixelt Amezcua	Ronan Silva
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Theatre:	Stephanie Zarife	Natalie Garcia
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Lacrosse:	Peyton Hens
Golf:	Max Wilkens

## **Academy Meetings**

- 4/4-Awning estimate for Prep carline
- 4/8-Prep administration team meeting
- 4/11-Parent tour
- 4/13-Paver project estimate
- 4/14-PTCC meeting
- 4/19-Parent tour
- 4/20-Cadet Handbook Review
- 4/21-Master schedule meeting
- 4/27-Securing front door estimate
- 4/28-Zoom meeting with Sarasota County for 22-23 busing

## **Parent and Community Highlights**

-Prep has conducted many individual campus tours recently to increase the 6<sup>th</sup> grade enrollment.

-4/13-Enrollment/information event: 8:30am-9:30am

-4/19+4/21: New Family Welcome Night

## **Attention Items:**

Staffing:

The Prep administration has been working diligently in making appropriate staffing decisions for the next school year based on proposed enrollment, teacher effectiveness, and retirement. Through this process, we began to post and interview for open positions on the Prep campus. The positions available are: English, Computer Science, Military Science, ESE Liaison.

The interview team will continue to review resumes, conduct phone and face-to-face interviews to find the very best candidates. The interview team consists of the head of school, the assistant heads of school, and the subject area department chair.

## **May Prep Athletic Roundup:**

### **Lacrosse:**

4/8/22 – The Eagles traveled to Bradenton Friday to play Bradenton Christian School. It was a very rough game and the Eagles fell short 21-15. Ethan Aslum and Brody Knepper each scored a goal, Ellis Howell had 2, Peyton Hens 3, and both Mickey Cohen and Liam Fernandez each scored 4. Jackson Cozy was amazing at goal with 16 saves.

4/11/22 – The SMA Prep Lacrosse team destroyed Inspiration Academy Monday, winning 11-0. Mickey Cohen scored 5 goals, Liam Fernandez and Peyton Hens scored 2 and Ellis Howell and Michael Smolka each scored one. Goalie Jackson Cozy once again was amazing with 5 saves. This team is really hot and ready to take on Berkeley Prep in a rematch on Thursday. Great job Eagles.

4/14/22 - The Prep Lacrosse team lost a very close game last Thursday to Berkeley Prep 8-6. Mickey Cohen scored 3 goals, Liam Fernandez 2, and Peyton Hens 1. Jackson Cozy had 8 saves. Coach Fite stated that it was a great game and they played better than they had all season.

4/20/22 - The Lacrosse team traveled to Tampa yesterday to take on Tampa Prep Academy. Your Eagles came away with a huge win 11-4 to close out their season. Mickey Cohen had 7 goals, Ellis Howell 2 and Liam Fernandez 2. Jackson "The denier" Cozy had 8 incredible saves. Great job Prep Eagles on a fantastic overall team win.

### **Golf:**

4/14/22 - The Prep golf team lost a heartbreaker last Thursday to Rowlett Academy. Phoenix Scanlan once again led all scores with a 38 but it wasn't enough as the Eagles lost 196-197. The team will regroup this week at practice focusing on scoring and their short game. They will take on Suncoast Academy Thursday at Serenoa Golf Club.

4/1/22 – The Prep Eagles defeated Suncoast Academy Thursday 193-213. Coach Smith stated that everyone played extremely well in the windy conditions. This week's player shout out goes to Christian Gelsomine for his season best score. Great job Eagles.

4/26/22 - The Prep Golf team lost a heartbreaker Tuesday to St. Joseph's, 200-199. With two main starters battling injuries, the team needed some of the new players to come through with some low scores. First year golfer, Max Wilkins, cut 8 strokes from last week to place number 2 for the Eagles. Unfortunately it wasn't quite enough and the team lost by one mere stroke. The team will play SSAS on Thursday at Tatum Ridge to close out the regular season. Good luck

Eagles.

4/28/22 - The golf team lost yesterday to SSAS in a very close match. Phoenix Scanlan shot the low Eagle score with a 42. Xander Bartnesky, Ellis Howell, Christian Gelsomine, Collin Sawdy, Sam Crumble and Wyatt Paret all shot season low scores. The players will compete in a team scramble next Tuesday before sending Phoenix off to the league Championship to compete individually on May 6th. Great job Eagles.

5/18/22 – Lacrosse and Golf will hold their season ending awards program in the Prep Cafeteria at 3:45.

To: Governing Board, Sarasota Military Academy  
Through: SMA-COL Bowman, Christina, Executive Director  
801 North Orange Avenue  
Sarasota, Florida 34236

From: SMA-COL Fout, Frederick T., Head of School  
Sarasota Military Academy  
801 North Orange Avenue  
Sarasota, Florida 34236  
[fred.fout@oursma.org](mailto:fred.fout@oursma.org)



Date: 05 May 2022

Re.: Board Report for Regular Sarasota Military Academy Board Meeting on  
Tuesday, 10 May 2022

High School Enrollment 2021/2022 as of 05/05/2022:

9th Grade	167
10th Grade	165
11th Grade	170
12th Grade	<u>138</u>
	640

High School Admissions for 2022/2023 as of 05/05/2020

- 9th Grade
  - 107 (57%) confirmed from SMA MS
  - 92 of 140 confirmed from other schools
- 10th Grade
  - 23 of 44 confirmed
- 11th Grade
  - 12 of 32 confirmed
- 12 Grade
  - 1 of 3 confirmed

COVID UPDATES between the last report date of 04/05/2022 and 05/05/2022:  
3 Cadet positive cases reported, 2 additional from Faculty and Staff.

RECOGNITIONS:

- Thank you to
- Thank you to

Accomplishments:

- Met with HS Administrative Team daily to address the following concerns:
  - At-Risk students, and ongoing behavioral contracts

- Faculty and Staff social and emotional wellness and morale
  - Covid Updates and School Safety
  - Interventions for students needing to meet State testing requirements and core class completion for graduation
- Faculty Meeting on April 25th
  - Announcements and Recognitions
  - Board Updates - SMA-COL Bowman
  - Community Education - SCSB Candidate Dawnyelle Singleton
  - ESSER III Updates
  - Data Updates for 2022/2023
- Monthly Safety Drills
- Met with Faculty Representative to discuss faculty concerns and question
- Met with standing committees:
  - School Wide Support Team (SWST)
  - Positive Behavior Intervention Supports (PBIS)
  - Advisory/SEL Committee
  - School Safety Team
- Prepared reports and documents, meeting the requirements for updated
  - Charter Links submissions - up to date for the Academy for 21/22 SY
  - School Safety monthly reports
- Multiple meetings with individual Teachers, Parents, and Cadets regarding issues related to cadet success at SMA and Covid
- Teacher Appreciation Week, May 2nd through the 6th

#### On-Going Projects:

- Admissions offers and communication with interested parents that have not confirmed their seats at the HS
- Finalizing PRIDE Evaluation and other Evaluation documentation
- Promotion of SMA for potential cadets and retention for existing cadets
- Budget discussions and planning for 22/23 school year and following years, affecting staffing, facilities, and departmental budgets
- Transition discussions and planning with Instructional Leadership Team regarding implementation of B.E.S.T. Standards and new assessment and progress monitoring requirements.

#### Upcoming Events:

- Blood Drive, 05/05-06
- Raider Competition-Island Coast HS, 05/07
- **SMA BOARD OF DIRECTORS MEETING, 05/10 @ 4:30pm**
- SMA Film Festival, 05/12 @ 6pm - Burns Court Cinema
- HS Raiders Awards Night, 05/13 @ 5pm
- College and Career Day, 05/17
- Seniors Last Day of Classes, 05/18
- Prom, 05/18

- Senior Check Out, Yearbook Signing, Clearance, 05/19
  - Graduation, 05/20 @ 7pm
  - Finals, 05/26 & 27 - HALF DAY
  - Last Day of School, 05/27
  - Memorial Day Parade, 05/30
  - End of Year Luncheon, 06/01 @ Stottlemeyer's
  - PTCC Meeting, 06/01 @ 4:45pm
-

## **Athletic Department Report – Board Meeting**

**May 10, 2022**

All high school athletic teams have wrapped up their seasons for the 2021-22 school year. The school year brought about many successes within the athletic department. Probably the most significant of these was that on Sept. 4 SMA hosted its' first ever home cross country meet. This event was a huge success. All schools that participated were very complimentary to the course and organization of the race. This event will return for the fall of 2022. It is scheduled to be run on Sept. 10, 2022.

Other notable successes include the return of boys' basketball and girls' lacrosse to SMA. The boys' basketball team matched the number for most wins for a team since 2013. Also, two SMA boys and one girl, the first ever in school history, advanced to the state wrestling finals in March.

Yet, even with these successes, challenges are still having to be overcome within the athletic department. Facilities are and will continue to be the greatest challenge for SMA high school athletics. This includes both the lack of campus facilities and difficulty in securing off-campus athletic fields. SMA high school has **no** on-campus facilities to host athletic competitions. No other FHSAA registered schools that we schedule in athletics are restricted to this degree. Besides creating a disservice to our current cadet-athletes, this factor is a major deterrent when attempting to recruit students to SMA high school. Not only are the facilities on our campus unsuitable for athletic competitions, they severely limit what can be accomplished in our physical education classes. This issue with facilities can also be seen as a contributing factor for the poor attendance at all SMA athletic events.

Also, transportation is a major issue. **Every** scheduled bus trip for athletics had to be cancelled this year due to driver availability. These challenges continue to put a strain on both our cadet-athletes and their parents

It is the desire of the athletic department to provide our students a complete high school experience. The challenges discussed previously greatly limit this experience.

**SARASOTA MILITARY ACADEMY  
Media Center Report - May 2022**

**HELLEN HARVEY - FILM TEACHER & MEDIA SPECIALIST**

The media center had a great year in terms of the number of books checked out and the number of students using the library at lunch and during class time.

We had a regular cadre of students who came to play chess at lunch. Also, the number of students coming to complete school work or just read increased, but not to the levels we would like to see. Our new manga section is the most read, as was the graphic novel section.

Considering the size of our library – the size of an average classroom – we are doing a more than satisfactory job.

Our policy of purchasing books based on student recommendations has worked well.

We had three regular student assistants who shelve and shelf read our books. These students receive community service hours.

We received two grants and money from our PTCC to support the purchase of books. Our PTCC also organized a fundraiser with Barnes and Noble to support both schools.

**THIS SUMMER WE WILL BE WRITING GRANTS TO BOOST OUR NONFICTION COLLECTION**

In the five years that I have been in charge of the library, I am proud that we have begun a culture of reading.

**Remember, any donation to the media center is doubled through the Flanzer Trust.**

**Here is an historical chart of our checkouts since 2013:**

(keep in mind changes in enrollment and COVID)

2013 -14 - 527

2014 -15 - 1174

2015 -16 - 891

2016 -17 - 899

2017 -18 - 2 108

2018 -19 - 4 501

2019 - 20 - 3 880

2020 - 21 - 2 714

**2021 - 22 - 4 175 - rebound year**

## MAY 2022 REPORT

# SMA HS MEDIA CENTER

BOOKS IN OUR  
LIBRARY  
5,000

## ITEMS BORROWED

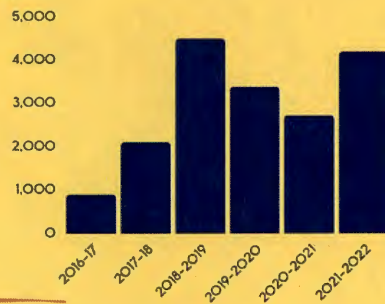
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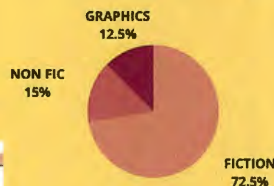
MAY

4 200

## Historical checkouts



## BY GENRE



## MOST CHECKED OUT BOOKS OF ALL TIME



SUPPORT  
OUR  
SMA  
MEDIA  
CENTER

## GIVE THE GIFT OF READING

### CONSIDER A ONE TIME DONATION



Your donation dollars can be  
matched at Flanzer Trust

SEE HELLEN HARVEY FOR MORE INFORMATION  
YOU CAN EMAIL HER AT: [hellen.harvey@oursma.org](mailto:hellen.harvey@oursma.org)

VISIT OUR WISHLIST ON AMAZON  
<https://amzn.to/2ZFW4rZ>



**SARASOTA MILITARY ACADEMY**

Commandant  
801 North Orange Avenue  
Sarasota, Florida 34236

4 May 2022

MEMORANDUM FOR GOVERNING BOARD, SARASOTA MILITARY ACADEMY  
THROUGH EXECUTIVE DIRECTOR OF SCHOOLS

SUBJECT: Significant Activities Report

**Significant activities past thirty days:**

- JROTC Awards Ceremony 21 April
- Cadet Change of Responsibility Ceremony 28 April
- Teacher Appreciation Carwash 6 May

**Significant activities next thirty days:**

- Graduation-20 May
- Memorial Day parade-30 May
- JCLC-4 June

Respectfully,

***Clarence Arrington***

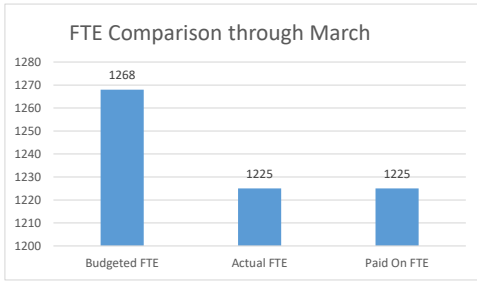
Clarence Arrington

Major (Retired)

Senior Army Instructor

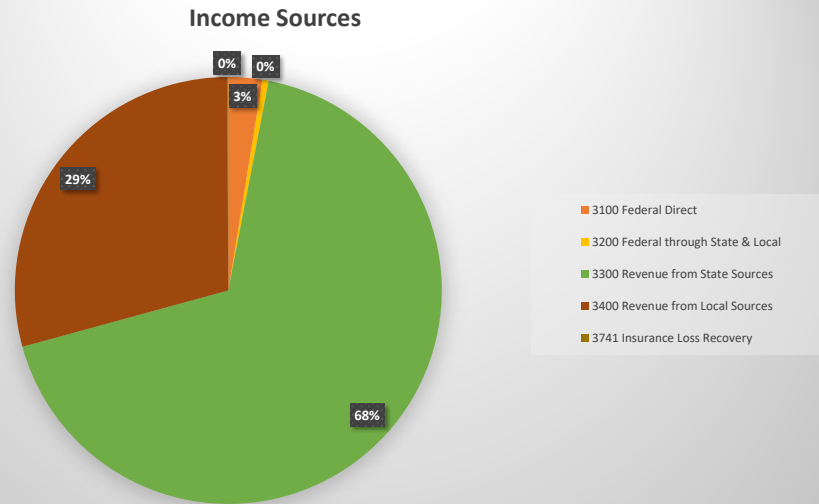
# Profit and Loss Pie Charts through March 2022

Updated FTE numbers will show in April.



Income		
3100 Federal Direct	\$	260,946
3200 Federal through State & Local	\$	48,323
3300 Revenue from State Sources	\$	6,893,706
3400 Revenue from Local Sources	\$	2,970,161
3741 Insurance Loss Recovery	\$	8,068

**Total Revenue \$10,181,204**

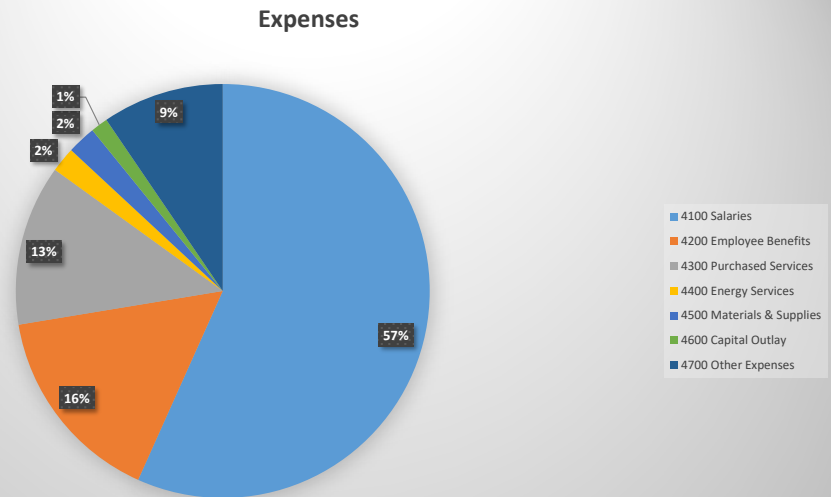


Expenses		
4100 Salaries	\$5,667,272	
4200 Employee Benefits	\$1,568,107	
4300 Purchased Services	\$1,255,282	
4400 Energy Services	\$196,080	
4500 Materials & Supplies	\$223,837	
4600 Capital Outlay	\$133,597	
4700 Other Expenses	\$950,323	

**Total Expenses \$9,994,498**

**P&L YTD through March \$186,706**

**Salaries & Benefits Equal 73 % of Budget**



# Sarasota Military Academy

## Balance Sheet- By Campus

As of March 31, 2022

	TOTAL
<b>ASSETS</b>	
Current Assets	
Bank Accounts	
1110 Cash and cash equivalents	1,954,257
8-1111 Sport Team Bank Accounts	62,053
<b>Total Bank Accounts</b>	<b>\$2,016,310</b>
Other Current Assets	
1215 Due from Foundation - Current	10,716
1220 Due from Other Governments	264,746
<b>Total Other Current Assets</b>	<b>\$275,462</b>
<b>Total Current Assets</b>	<b>\$2,291,772</b>
Fixed Assets	\$18,876,649
<b>TOTAL ASSETS</b>	<b>\$21,168,421</b>
<b>LIABILITIES AND EQUITY</b>	
Liabilities	
Current Liabilities	
Accounts Payable	\$25,651
Credit Cards	\$42,943
Other Current Liabilities	\$1,054,028
<b>Total Current Liabilities</b>	<b>\$1,122,622</b>
Long-Term Liabilities	\$10,671,457
<b>Total Liabilities</b>	<b>\$11,794,079</b>
Equity	
3010 Invested In Capital Assets, Net	7,450,977
3020 Temporarily Restricted Net Asse	20,433
3030 Unrestricted Net Assets	1,716,228
Net Income	186,704
<b>Total Equity</b>	<b>\$9,374,342</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$21,168,421</b>

$\$2,291,772 - \$1,122,622 = \$1,169,150$  Working Capital; February- \$1,132,608; Up \$36,542

Ratio of Assets to Liabilities =  $\$2,291,772 / \$1,122,622 = 2.04$ ; Up .05 from February- 1.99

# Sarasota Military Academy

Budget vs. Actuals: FY22 Board Approved Budget - FY22 P&L

July 2021 - March 2022

**9 Months in should be at 75%**

	TOTAL		
	ACTUAL	BUDGET	% OF BUDGET
Income			
3100 Federal Direct	260,946	284,302	92.00 %
3200 Federal Through State & Local	48,323	92,184	52.00 %
3300 Revenue from State Sources	6,893,706	8,863,971	78.00 %
3400 Revenue from Local Sources	2,970,161	4,205,770	71.00 %
3741 Insurance Loss Recovery	8,068		
<b>Total Income</b>	<b>\$10,181,203</b>	<b>\$13,446,227</b>	<b>76.00 %</b>
GROSS PROFIT	<b>\$10,181,203</b>	<b>\$13,446,227</b>	<b>76.00 %</b>
Expenses			
4100 Salaries	5,667,272	7,615,197	74.00 %
4200 Employee Benefits	1,568,107	2,255,451	70.00 %
4300 Purchased Services	1,255,282	1,760,403	71.00 %
4400 Energy Services	196,080	216,025	91.00 %
4500 Materials & Supplies	223,837	262,896	85.00 %
4600 Capital Outlay	133,597	285,694	47.00 %
4700 Other Expenses	950,323	1,345,131	71.00 %
<b>Total Expenses</b>	<b>\$9,994,499</b>	<b>\$13,740,797</b>	<b>73.00 %</b>
NET OPERATING INCOME	<b>\$186,704</b>	<b>\$ (294,570)</b>	<b>(63.00 %)</b>
NET INCOME	<b>\$186,704</b>	<b>\$ (294,570)</b>	<b>(63.00 %)</b>

# Sarasota Military Academy

## Profit and Loss - YTD - By Campus

July 2021 - March 2022

	HS	PREP	TOTAL
Income			
3100 Federal Direct	238,461	22,485	\$260,946
3200 Federal Through State & Local	28,593	19,730	\$48,323
3300 Revenue from State Sources	3,680,009	3,213,697	\$6,893,706
3400 Revenue from Local Sources	1,758,704	1,211,457	\$2,970,161
3741 Insurance Loss Recovery		8,068	\$8,068
<b>Total Income</b>	<b>\$5,705,767</b>	<b>\$4,475,436</b>	<b>\$10,181,203</b>
GROSS PROFIT	<b>\$5,705,767</b>	<b>\$4,475,436</b>	<b>\$10,181,203</b>
Expenses			
4100 Salaries	3,196,418	2,470,854	\$5,667,272
4200 Employee Benefits	863,434	704,673	\$1,568,107
4300 Purchased Services	738,865	516,417	\$1,255,282
4400 Energy Services	81,992	114,089	\$196,080
4500 Materials & Supplies	159,302	64,535	\$223,837
4600 Capital Outlay	59,354	74,244	\$133,597
4700 Other Expenses	625,025	325,298	\$950,323
<b>Total Expenses</b>	<b>\$5,724,390</b>	<b>\$4,270,109</b>	<b>\$9,994,499</b>
NET OPERATING INCOME	<b>\$ (18,623)</b>	<b>\$205,328</b>	<b>\$186,704</b>
NET INCOME	<b>\$ (18,623)</b>	<b>\$205,328</b>	<b>\$186,704</b>

4780 Depreciation Expense

344,990

143,703

Difference- The HS has \$201,287 higher depreciation expense than the Prep.

Some anomalies for the month:

Income:

ESSER Request- \$118K

1.5 Millage Capital Request- \$68K

IRS ERC tax rebate- \$48K

Expenses:

Retro Pay Increase- \$112K

Still Pending- FTE adjustment down from 1225 to 1210, retro to January 1st. Will take effect in April (Approx. \$100K)

Transportation has not been finalized- Won't know that effect until the May MES.

## Cash Statement of Operations- YTD (PE 03-31-22)

<b>YTD Through March</b>	<b>Total</b>	<b>Operating</b>	<b>Capital</b>
<b>3100 · Federal Direct</b>	<b>260,946</b>	<b>260,946</b>	<b>0</b>
<b>3200 · Federal Through State &amp; Local</b>	<b>48,323</b>	<b>48,323</b>	<b>0</b>
<b>3300 · Revenue from State Sources</b>	<b>6,893,706</b>	<b>6,399,694</b>	<b>494,012</b>
<b>3400 · Revenue from Local Sources</b>	<b>2,970,161</b>	<b>2,783,969</b>	<b>186,192</b>
<b>3741 · Insurance Loss Recovery</b>	<b>8,068</b>	<b>8,068</b>	<b>0</b>
<b>Total Income</b>	<b>10,181,204</b>	<b>9,501,000</b>	<b>680,204</b>

<b>4100 · Salaries</b>	<b>5,667,272</b>	<b>5,667,272</b>	<b>0</b>
<b>4200 · Employee Benefits</b>	<b>1,568,107</b>	<b>1,568,107</b>	<b>0</b>
<b>4300 · Purchased Services</b>	<b>1,255,282</b>	<b>1,255,282</b>	<b>0</b>
<b>4400 · Energy Services</b>	<b>196,080</b>	<b>196,080</b>	<b>0</b>
<b>4500 · Materials &amp; Supplies</b>	<b>223,837</b>	<b>223,837</b>	<b>0</b>
<b>4600 · Capital Outlay</b>	<b>133,597</b>	<b>133,597</b>	<b>0</b>
<b>4700 · Other Expenses</b>	<b>461,630</b>	<b>461,630</b>	<b>0</b>
<b>Capital Purchases</b>	<b>283,407</b>		<b>283,407</b>
<b>Debt Service</b>	<b>412,114</b>		<b>412,114</b>

<b>Total Expenses</b>	<b>10,201,326</b>	<b>9,505,805</b>	<b>695,521</b>
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<b>YTD Through March</b>	<b>-20,122</b>	<b>-4,805</b>	<b>-15,317</b>
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**The TOTAL column includes the capital income up top and the capital purchases and the debt service on the bottom. It excludes depreciation as an expense. The OPERATING column does NOT include capital income up top or capital purchases, debt service or depreciation on the bottom.**



# FOUNDATION DASHBOARD FY '22



## Metrics Analysis with Foundation Performance

July 1, 2021 - April 29, 2022

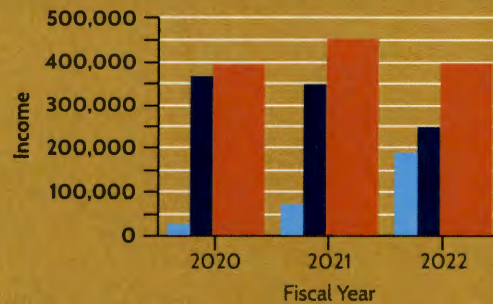
### NET CASH Balance

This is the amount of money on-hand in the Foundation's account. It is a current asset on the Balance Sheet and includes all receipts minus disbursements including the initial deposit at the start of the fiscal year to the present date of this report.

# \$398,476

*Does NOT Include Receivables*

Receivables: \$ 75,560  
Donations with Restrictions... \$248,517  
Donations without Restrictions.. \$190,746



### FYTD GIFT REVENUE

Gross Revenue... \$257,996  
Expenses... \$234,045  
NET Revenue... \$23,950

### FYTD EXPENSES

Labor \$106,760

TOTAL \$234,045

Grants & Similar  
Amounts Paid  
\$102,846

Non-Labor \$24,439

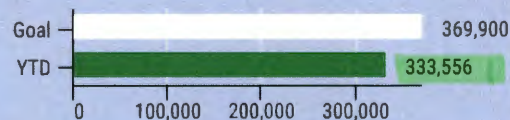
Includes:  
Purchased Services;  
Materials & Supplies;  
Capital Outlay

## PERFORMANCE EVALUATION

FUNDRAISING FY GOAL: \$369,900

Percent to GOAL: 90%\*

\*Includes Receivables



## April FINANCIAL OVERVIEW

TOTAL INCOME: \$76,715  
EXPENSES: \$12,929  
NET INCOME: \$63,786

Labor \$10,700

Grants & Similar  
Amounts Paid  
\$2,000

Non-Labor \$228

Includes:  
Purchased Services;  
Materials & Supplies;  
Capital Outlay

## FUNDRAISING EVENTS

Giving Challenge 2022: TOTAL RAISED \$30,260

# Sarasota Military Academy Foundation, Inc.

## Statement of Financial Position

As of April 30, 2022

	TOTAL		
	AS OF APR 30, 2022	AS OF APR 30, 2021 (PY)	% CHANGE
<b>ASSETS</b>			
Current Assets			
Bank Accounts			
1001 Business Checking	398,476	456,283	(13.00 %)
<b>Total Bank Accounts</b>	<b>\$398,476</b>	<b>\$456,283</b>	<b>(13.00 %)</b>
Other Current Assets			
1130 Accounts Receivable	75,560	0	
<b>Total Other Current Assets</b>	<b>\$75,560</b>	<b>\$0</b>	<b>0%</b>
<b>Total Current Assets</b>	<b>\$474,036</b>	<b>\$456,283</b>	<b>4.00 %</b>
<b>TOTAL ASSETS</b>	<b>\$474,036</b>	<b>\$456,283</b>	<b>4.00 %</b>
<b>LIABILITIES AND EQUITY</b>			
Liabilities			
Current Liabilities			
Credit Cards			
2150 Wells Fargo Visa	106	872	(88.00 %)
<b>Total Credit Cards</b>	<b>\$106</b>	<b>\$872</b>	<b>(88.00 %)</b>
<b>Total Current Liabilities</b>	<b>\$106</b>	<b>\$872</b>	<b>(88.00 %)</b>
Long-Term Liabilities			
2205 Due to SMA	10,716	151,779	(93.00 %)
<b>Total Long-Term Liabilities</b>	<b>\$10,716</b>	<b>\$151,779</b>	<b>(93.00 %)</b>
<b>Total Liabilities</b>	<b>\$10,822</b>	<b>\$152,650</b>	<b>(93.00 %)</b>
Equity			
3005 Net Assets without Donor Restriction	190,746	(96,419)	298.00 %
3010 Net Assets with Donor Restriction	248,517	384,717	(35.00 %)
Net Income	23,950	15,335	56.00 %
<b>Total Equity</b>	<b>\$463,213</b>	<b>\$303,633</b>	<b>53.00 %</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$474,036</b>	<b>\$456,283</b>	<b>4.00 %</b>

# Sarasota Military Academy Foundation, Inc.

## Statement of Activities

July 2021 - April 2022

	TOTAL		
	JUL 2021 - APR 2022	JUL 2020 - APR 2021 (PY)	% CHANGE
Income			
3440 Gifts, Grants & Bequests	257,972	196,346	31.00 %
3490 Misc. Local Sources	24		
<b>Total Income</b>	<b>\$257,996</b>	<b>\$196,346</b>	<b>31.00 %</b>
GROSS PROFIT	<b>\$257,996</b>	<b>\$196,346</b>	<b>31.00 %</b>
Expenses			
4100 Salaries	86,667	71,250	22.00 %
4200 Employee Benefits	20,093	16,149	24.00 %
4300 Purchased Services	15,904	10,744	48.00 %
4500 Materials & Supplies	919	2,022	(55.00 %)
4600 Capital Outlay	6,227	5,058	23.00 %
4700 Other Expenses	1,389	789	76.00 %
5100 Grant Expense	102,846	74,997	37.00 %
<b>Total Expenses</b>	<b>\$234,045</b>	<b>\$181,010</b>	<b>29.00 %</b>
NET OPERATING INCOME	<b>\$23,950</b>	<b>\$15,335</b>	<b>56.00 %</b>
NET INCOME	<b>\$23,950</b>	<b>\$15,335</b>	<b>56.00 %</b>

# Sarasota Military Academy Foundation, Inc.

## Statement of Activities

July 2021 - April 2022

	TOTAL		
	JUL 2021 - APR 2022	JUL 2020 - APR 2021 (PY)	% CHANGE
Income			
3440 Gifts, Grants & Bequests			
3441 Donations without Restriction			
3441A Unrestricted	125,691	45,938	174.00 %
<b>Total 3441 Donations without Restriction</b>	<b>125,691</b>	<b>45,938</b>	<b>174.00 %</b>
3442 Donations in Kind	4,150	4,790	(13.00 %)
3443 Donations with Restrictions			
3443A Temp Restricted	128,131	145,618	(12.00 %)
<b>Total 3443 Donations with Restrictions</b>	<b>128,131</b>	<b>145,618</b>	<b>(12.00 %)</b>
<b>Total 3440 Gifts, Grants &amp; Bequests</b>	<b>257,972</b>	<b>196,346</b>	<b>31.00 %</b>
3490 Misc. Local Sources			
3495D Credit Card Rebate	24		
<b>Total 3490 Misc. Local Sources</b>	<b>24</b>		
<b>Total Income</b>	<b>\$257,996</b>	<b>\$196,346</b>	<b>31.00 %</b>
<b>GROSS PROFIT</b>	<b>\$257,996</b>	<b>\$196,346</b>	<b>31.00 %</b>
Expenses			
4100 Salaries			
4110 Administrator	86,667	71,250	22.00 %
<b>Total 4100 Salaries</b>	<b>86,667</b>	<b>71,250</b>	<b>22.00 %</b>
4200 Employee Benefits			
4210 Retirement	9,377	7,125	32.00 %
4220 FICA	6,764	5,451	24.00 %
4230 Group Insurance	90	81	11.00 %
4240 Worker's Compensation	535	323	65.00 %
4291 Employee Medical Reimbursement	2,500	2,250	11.00 %
4292 Employee Training and Seminars	827	919	(10.00 %)
<b>Total 4200 Employee Benefits</b>	<b>20,093</b>	<b>16,149</b>	<b>24.00 %</b>
4300 Purchased Services			
4310 Professional & Technical Services	8,155	5,595	46.00 %
4360 Rentals		3,150	(100.00 %)
4370 Communications	7,749	1,999	288.00 %
<b>Total 4300 Purchased Services</b>	<b>15,904</b>	<b>10,744</b>	<b>48.00 %</b>
4500 Materials & Supplies			
4510 Office Supplies	50		
4570 Food	484	101	378.00 %
4590 Other Materials & Supplies	385	1,921	(80.00 %)
<b>Total 4500 Materials &amp; Supplies</b>	<b>919</b>	<b>2,022</b>	<b>(55.00 %)</b>

# Sarasota Military Academy Foundation, Inc.

## Statement of Activities

April 2022

	TOTAL		
	APR 2022	APR 2021 (PY)	% CHANGE
Income			
3440 Gifts, Grants & Bequests			
3441 Donations without Restriction			
3441A Unrestricted	40,415	3,266	1,137.00 %
<b>Total 3441 Donations without Restriction</b>	<b>40,415</b>	<b>3,266</b>	<b>1,137.00 %</b>
3443 Donations with Restrictions			
3443A Temp Restricted	36,300	3,200	1,034.00 %
<b>Total 3443 Donations with Restrictions</b>	<b>36,300</b>	<b>3,200</b>	<b>1,034.00 %</b>
<b>Total 3440 Gifts, Grants &amp; Bequests</b>	<b>76,715</b>	<b>6,466</b>	<b>1,086.00 %</b>
<b>Total Income</b>	<b>\$76,715</b>	<b>\$6,466</b>	<b>1,086.00 %</b>
GROSS PROFIT	<b>\$76,715</b>	<b>\$6,466</b>	<b>1,086.00 %</b>
Expenses			
4100 Salaries			
4110 Administrator	8,750	7,917	11.00 %
<b>Total 4100 Salaries</b>	<b>8,750</b>	<b>7,917</b>	<b>11.00 %</b>
4200 Employee Benefits			
4210 Retirement	947	792	20.00 %
4220 FICA	689	606	14.00 %
4230 Group Insurance	9	9	0.00 %
4240 Worker's Compensation	56	36	55.00 %
4291 Employee Medical Reimbursement	250	250	0.00 %
4292 Employee Training and Seminars		15	(100.00 %)
<b>Total 4200 Employee Benefits</b>	<b>1,950</b>	<b>1,707</b>	<b>14.00 %</b>
4300 Purchased Services			
4370 Communications	16	837	(98.00 %)
<b>Total 4300 Purchased Services</b>	<b>16</b>	<b>837</b>	<b>(98.00 %)</b>
4500 Materials & Supplies			
4510 Office Supplies	10		
4570 Food	135		
<b>Total 4500 Materials &amp; Supplies</b>	<b>145</b>		
4600 Capital Outlay			
4644 Noncapitalized Computer Hardware		31	(100.00 %)
4690 Noncapitalized Computer Software	60	63	(5.00 %)
<b>Total 4600 Capital Outlay</b>	<b>60</b>	<b>94</b>	<b>(36.00 %)</b>
4700 Other Expenses			
4730 Taxes Dues & Fees	7	29	(75.00 %)
<b>Total 4700 Other Expenses</b>	<b>7</b>	<b>29</b>	<b>(75.00 %)</b>
5100 Grant Expense	2,000	23,500	(91.00 %)
<b>Total Expenses</b>	<b>\$12,929</b>	<b>\$34,085</b>	<b>(62.00 %)</b>
NET OPERATING INCOME	<b>\$63,786</b>	<b>\$ (27,619)</b>	<b>331.00 %</b>
<b>NET INCOME</b>	<b>\$63,786</b>	<b>\$ (27,619)</b>	<b>331.00 %</b>

# Sarasota Military Academy Foundation, Inc.

## Statement of Activities

July 2021 - April 2022

	TOTAL		
	JUL 2021 - APR 2022	JUL 2020 - APR 2021 (PY)	% CHANGE
4600 Capital Outlay			
4642 Noncapitalized F, F & Equipment	150	170	(12.00 %)
4644 Noncapitalized Computer Hardware		35	(100.00 %)
4690 Noncapitalized Computer Software	6,077	4,853	25.00 %
<b>Total 4600 Capital Outlay</b>	<b>6,227</b>	<b>5,058</b>	<b>23.00 %</b>
4700 Other Expenses			
4730 Taxes Dues & Fees	1,389	789	76.00 %
<b>Total 4700 Other Expenses</b>	<b>1,389</b>	<b>789</b>	<b>76.00 %</b>
5100 Grant Expense	102,846	74,997	37.00 %
<b>Total Expenses</b>	<b>\$234,045</b>	<b>\$181,010</b>	<b>29.00 %</b>
<b>NET OPERATING INCOME</b>	<b>\$23,950</b>	<b>\$15,335</b>	<b>56.00 %</b>
<b>NET INCOME</b>	<b>\$23,950</b>	<b>\$15,335</b>	<b>56.00 %</b>

**Sarasota Military Academy Foundation, Inc.**  
**Fund Balances of Restricted Donations**  
As of April 30, 2022

	Cadets In Need	CDO	Future Purchase/ Property Improvements	Kitchen Equipment	Media Center	Music Program	Strategic Marketing	Total *Temporary Restrictions
<b>Income</b>								
3440 Gifts, Grants & Bequests								
3441 Donations without Restriction								
3441A Unrestricted								2,800.00
Total 3441 Donations without Restriction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 2,800.00
3443 Donations with Restrictions		21,000.00			0.00			21,000.00
3443A Temp Restricted	12,100.00	310,000.00	100,000.00	8,300.00	24,700.00	17,308.00	18,756.27	646,859.24
Total 3443 Donations with Restrictions	\$ 12,100.00	\$ 331,000.00	\$ 100,000.00	\$ 8,300.00	\$ 24,700.00	\$ 17,308.00	\$ 18,756.27	\$ 667,859.24
Total 3440 Gifts, Grants & Bequests	\$ 12,100.00	\$ 331,000.00	\$ 100,000.00	\$ 8,300.00	\$ 24,700.00	\$ 17,308.00	\$ 18,756.27	\$ 670,659.24
<b>Total Income</b>	\$ 12,100.00	\$ 331,000.00	\$ 100,000.00	\$ 8,300.00	\$ 24,700.00	\$ 17,308.00	\$ 18,756.27	\$ 670,659.24
<b>Gross Profit</b>	\$ 12,100.00	\$ 331,000.00	\$ 100,000.00	\$ 8,300.00	\$ 24,700.00	\$ 17,308.00	\$ 18,756.27	\$ 670,659.24
<b>Expenses</b>								
4100 Salaries								
4110 Administrator		173,750.16						173,750.16
Total 4100 Salaries	\$ 0.00	\$ 173,750.16	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 173,750.16
4200 Employee Benefits								
4210 Retirement		18,085.70						18,085.70
4220 FICA		13,425.81						13,425.81
4230 Group Insurance		189.00						189.00
4240 Worker's Compensation		930.26						930.26
4291 Employee Medical Reimbursement		5,250.00						5,250.00
4293 Other Employee Benefits		10,000.00						10,000.00
Total 4200 Employee Benefits	\$ 0.00	\$ 47,880.77	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 47,880.77
4300 Purchased Services								
4310 Professional & Technical Services		12,350.00					3,250.00	15,600.00
4370 Communications		1,844.89					7,592.00	9,436.89
Total 4300 Purchased Services	\$ 0.00	\$ 14,194.89	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 10,842.00	\$ 25,036.89
5100 Grant Expense	971.00				8,700.00	7,308.00		175,473.97
<b>Total Expenses</b>	\$ 971.00	\$ 235,825.82	\$ 0.00	\$ 0.00	\$ 8,700.00	\$ 7,308.00	\$ 10,842.00	\$ 122,111.76
<b>Net Operating Income</b>	\$ 11,129.00	\$ 95,174.18	\$ 100,000.00	\$ 8,300.00	\$ 16,000.00	\$ 10,000.00	\$ 7,914.27	\$ 248,517.45
<b>Net Income</b>	\$ 11,129.00	\$ 95,174.18	\$ 100,000.00	\$ 8,300.00	\$ 16,000.00	\$ 10,000.00	\$ 7,914.27	\$ 248,517.45

Friday, May 06, 2022 04:57:01 AM GMT-7 - Accrual Basis

## COL Richard C Swoope Jr

COL Richard C. Swoope Jr received a ROTC scholarship to the University of Detroit, Detroit, Michigan. COL Swoope was a Distinguished Military Graduate receiving a Bachelor of Science Degree in Public Administration from Oakland University Rochester Michigan, with a commission as a Second Lieutenant in the United States Army's Medical Service Corps, May 1988.

Upon completion of the Army Medical Department's Officer Basic Course, COL Swoope was assigned as a Medical Platoon Leader with the 423rd Medical Clearing Company, Fort Lewis, Washington. While assigned to 1 Corps and Fort Lewis, COL Swoope served as the Company Supply and Maintenance officer and Executive Officer, 423rd Medical Company, S-4 and Assistant S-4, 62nd Medical Brigade, During Operations Desert Shield/Desert Storm, Commander Headquarters and Headquarters Company, 62nd Medical Brigade, and Medical Logistics officer, Joint Task Force- Bravo, Soto Cano Airbase, Honduras.

COL Swoope graduated from the AMEDD Officer Advanced Course in December 1993 with a follow-on assignment as the Chief Distribution Division, 16th Medical Logistics Battalion, Camp Carroll, Republic of Korea. COL Swoope continued his military training with an internship at the United States Army's Medical Material Agency at Fort Detrick, Maryland. Upon completion of the USAMMA course, COL Swoope was assigned to Fort Bragg, North Carolina. While assigned to Fort Bragg, COL Swoope served as the S-4, 55th Medical Group (ABN), with a follow-on assignment as Commander, Alpha Company, 261st Area Support Medical Battalion (ABN).

COL Swoope has served as the logistics officer for the 324th Combat Support Hospital, Miami, Florida from 1999-2002, Operations Officer for the 322th Combat Support Hospital, Southfield Michigan from 2002-2005, Operations officer, 5th Medical Brigade, Birmingham Alabama from 2005-2008, Executive Officer 7304th Medical Training Support Battalion, Fort Sam Houston, Texas, Medical Readiness and Training Command, Fort Sam Houston, Texas as the G3, Chief of Operations, and most recently is assigned to the United States Army Reserve Medical Command Headquarters as the Deputy Chief of Staff, G3, Pinellas Park Florida.

COL Swoope's military education include the AMEDD Officer Basic and Advanced courses, Fort Sam Houston, Texas, Combined Arms Service and Staff course (CAS3)- Phase 1 and Phase 2, Medical Logistics Management course, Fort Sam Houston, Texas, Battalion Maintenance course, Fort Knox, KY, US Army Airborne School, Fort Benning, GA, Special Forces Assessment and Selection course, Fort Bragg, NC, and the 82nd Airborne Division Jumpmaster course, Fort Bragg, NC.

COL Swoope's awards and decorations include the Bronze Star Medal, Legion of Merit, Joint Service Commendation Medal, Meritorious Service Medal, Army Commendation Medal, Army Achievement Medal, Overseas Ribbon, Southwest Asia Ribbon with three Bronze Stars, the Kuwait Liberation Medal (Government of Saudi Arabia), the Kuwait Liberation Medal (Government of Kuwait), the Senior Parachutist Badge, Global War on Terrorism medal, British Parachutist wings, and the Expert Field Medical badge. COL Swoope is a member of the Order of Military Medical Merit.



## Special SMA PTCC Leadership Meeting

May 4, 2022

Invitees: **Debbie Strahs, Brenda Canales, Liz Bonnett, Karen Medina, AnnaMarie Rioux, Jeanine Signorelli, Rafael Robles, Fred Fout, Natalie Knipfer, Christina Bowman, Marsha Seagrave, Samantha Miller, Thomas Vara, Tyler Govaars, London McMichael, Hannah Monaghan, Angela Cohen, Pam Way**

### Meeting Business

- Attendance: See bolded people
- Do we have a quorum?
- Meeting Called to Order: **Jeanine called meeting to order.**

#### Agenda

**Jeanine:** 1. Vote in new members. Pam Way, motion to approve for Vice President, Prep. Debbie motioned, Liz second, all approved. Natalie, calendar events coordinator. Liz motioned, Brenda second, all approved. AnnaMarie merchandise, already on board and Karen Medina facebook/social media.

2. Outstanding leadership positions It looks like the only leadership position that may be open is parent/volunteer coordinator and we are not sure we are needing that right now. We will see how things go and decide at a later date.

#### 3. Outstanding events

**8<sup>th</sup> grade dance** It seems that only 30 cadets purchased tickets to the dance. Unless we can come up with something, we will lose deposit and monies paid to DJ etc. The team threw out some possible ideas but, not sure any of them would really work. Jeanine will talk to Colonel Vara and Kathy to see what they may have to offer.

**8<sup>th</sup> grade promotion** A nice class photo will be the gift given to the graduates and Jeanine will see about the balloon arch.

#### 4. Review of past events

**Book Fair** Per Liz, the prep Scholastic book fair sold \$5,000. This provided the teachers Scholastic resources from Scholastic dollars in the amount of \$1500. This is awesome. Liz will close out the book fair and provide us with the final amounts. Debbie shared that SMA had sales of \$4,400 at the Barnes and Noble book fair. This was a three day event. In order to get the most from our participation, we chose to receive our percentage in a gift card. The amount of our gift card is \$440. This will be earmarked for the English Dept/library. Debbie will send out an email to let them know we have this money. If they have any books they would like for the school, they can let us know and we will get



them. It was discussed that it may be nice to have the Scholastic book fair at the high school next year. Liz said that Kathy has already put in a proposed date for it and Debbie will get more information on this and try and make this event school wide at the same time. Kathy has requested 9-19 to 9-23. I know that Barnes and Noble would love for us to do another book fair with them. We will discuss this further. They recommended some time in December.

**Teacher appreciation** We have all learned some things after this years Teacher Appreciation week. We will be tossing around ideas prior to make sure it has more involvement by the cadets and families. We are very thankful for the parental support we did receive.

**5. Summer Meeting Schedule** The summer meeting schedule will just include the members of the PTCC Leadership team. We will have one meeting per month. Discuss an end of the year dinner to celebrate our accomplishments we made this year.

**6. Planning next year's calendar** Natalie will start working on the upcoming calendar and compare with this year's calendar. She will check with Angela on upcoming academy events. We will work to make our events academy wide, Prep and High School. Natalie will check to find out when book camp will be for new cadets.

**Brenda: Grant review**

Munoz requesting event for JROTC next year. Brenda to explain. Capt. Seagrave will talk to CWO Munoz and see what she is looking for in locations. There was a question regarding a previous Grant provided to the JSA and a new Grant request. Jeanine was to check and confirm the request. It was discussed that we will need to have accountability for these grants by pictures of how it was used, a letter explaining how it was used, possibly having the cadets come to a meeting to explain the purpose of the grant, etc.

**AnnaMarie/Jeanine: Merchandise** We will need to get pictures of the new tees and a list of colors to give to Angela to get posted on the website. It would be great to figure out a better website that is easier to figure out. We need to get AnnaMarie on the email for orders coming in. Jeanine is meeting with someone regarding promotional items.

**Liz: Treasurer report** Liz shared the Treasurer's report. She will be working on a proposed budget for the upcoming year. Jeanine asked if we needed a co-treasurer to help Liz out but, feel that only one person should be in charge of the treasury. To help out, Debbie will be taking over the Grants. She will get with Brenda to find out exactly what the process is for this position.



Debbie: Staff Appreciation/caterer We had a delicious meal catered by Entrees by Tronda. Everyone was very pleased.

Colonel Bowman requested that we discuss making sure there is water for the Memorial Day Parade. Karen will post on the PTCC social media page and ask to have it posted in the Eagle Weekly.

Thank you cards for donations received for Staff Appreciation Week, ie: Der Dutchman, caterer, and any other community donations. Debbie will send out thank you cards for caterer and Der Dutchman.

Jeanine mentioned that in March, we will be having 20<sup>th</sup> Anniversary events and we should be prepared for that.

Also, Colonel Vara has a concern about the sand at the prep. He is getting quotes for pavers. Jeanine mentioned considering some fundraisers to help out, ie families purchase a brick.

Our sweet cadet Hannah Monaghan shared with the team about a project the freshman are doing now. They are doing a fundraiser to provide funds for hygiene bags for homeless veterans through the Salvation Army. There are gift baskets on the SMA website that you can purchase raffle tickets for. Thank you Hannah for sharing this.

The next PTCC meeting will be June 7<sup>th</sup> at 6:00. (Location to be discussed) We will focus on the calendar and budget.

**Sarasota Military Academy**  
**Chief Executive Officer's Performance Appraisal**

School Year: \_\_\_\_\_

Date of Review: \_\_\_\_\_

Area:

**College, Careers, and  
Citizenship**

- |  |   |
|--|---|
| <input type="checkbox"/> Highly Effective  | <input type="checkbox"/> Effective      |
| <input type="checkbox"/> Needs Improvement | <input type="checkbox"/> Unsatisfactory |

Performance Goals:

- Improve student achievement score by one letter grade by the end of the 22/23 school year.
- Increase the number of students in accelerated courses.
- Reduce the achievement gap.
  - Close the gap between the academic achievement of white students and black students and between white students and Hispanic students.
  - Close the gap between the academic achievement of low SES students and overall student achievement.
- Align vertically the grades 6-12 curriculum.
- Integrate technology into learning.
  - Increase access to technology across schools and to all students while promoting the use of technology as a tool to advance student learning.
- Increase the Graduation Rate

Comments:

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Recommendations:

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Area:  <b>Leadership</b>	<input type="checkbox"/> Highly Effective <input type="checkbox"/> Effective <input type="checkbox"/> Needs Improvement <input type="checkbox"/> Unsatisfactory
Performance Goals: <ul style="list-style-type: none"> <li>• Acquire and retain quality staff.             <ul style="list-style-type: none"> <li>• Annually impact teacher retention in a positive way</li> <li>• Hire highly effective staff.</li> </ul> </li> <li>• Establish a performance-based culture system to develop and maintain high performing and motivated faculty and staff.</li> <li>• Create programming, staff training, climate and culture that integrates the Seven Core Values of the United States Army and Leadership Development consistently from grades 6-12.</li> </ul>	

Comments:  <hr/> <hr/> <hr/> <hr/>
Recommendations:  <hr/> <hr/> <hr/> <hr/>

Area:	<input type="checkbox"/> Highly Effective <input type="checkbox"/> Effective <input type="checkbox"/> Needs Improvement <input type="checkbox"/> Unsatisfactory
Resources	
Performance Goals: <ul style="list-style-type: none"> <li>• Increase the retention rate of rising ninth graders.</li> <li>• Increase overall enrollment.</li> <li>• Present the Board with a balanced budget, including a fund reserve equal to 5.0% of total projected revenue by June of 2023.</li> <li>• Provide the School Board and stakeholders with fiscal audits and reports in order to facilitate budget monitoring and adjust expenditures accordingly.</li> </ul>	

Comments:  <hr/> <hr/> <hr/> <hr/>
Recommendations:  <hr/> <hr/> <hr/> <hr/>

Area:  <b>Communication and Board/Community Relations</b>	<input type="checkbox"/> Highly Effective <input type="checkbox"/> Effective <input type="checkbox"/> Needs Improvement <input type="checkbox"/> Unsatisfactory
Performance Goals: <ul style="list-style-type: none"> <li>• Actively engage family, community, and business members to become partners in supporting high levels of student achievement.</li> <li>• Promote multicultural awareness and appreciation for social, economic, racial, and cultural diversity.</li> <li>• Collaborate with local governmental entities and other relevant organizations to support and promote community outcomes and district strategic goals and initiatives.</li> </ul>	

Comments:  <hr/> <hr/> <hr/> <hr/>
Recommendations:  <hr/> <hr/> <hr/> <hr/>