

**SARASOTA MILITARY ACADEMY
BOARD OF DIRECTORS
MEETING AGENDA
Thursday March 14, 2019**

- Call to Order
- Approval of the Minutes-Tab 1
 - February 14, 2019
- Executive Director of Schools' Report – Tab 2
 - AdvancED Review Update
 - Human Resources Report-Tab 3
 - Head of School Report - SMA Prep – Tab 4
 - Athletic Director Report
 - MYP Report
 - Faculty Representative
 - Head of School Report – SMA High – Tab 5
 - Athletic Director Report
 - IB Report
 - Faculty Representative
- SAI/Commandant's Report – Tab 6
- Treasurer's Report – Tab 7
 - Monthly Financial Report
- PTCC Committee Reports – Tab 8
- SMA Foundation, Inc. Report – Tab 9
- Committee Reports
- Chairperson's Report
- Old Business
- New Business
- Public Comment
- Meeting Adjournment

Sarasota Military Academy

BOARD OF DIRECTORS

MEETING MINUTES

14 February, 2019

Board of Director Members' Attendance

Present:

Mr. Herb Jones, Chairman
Mr. Kimball Bobbitt, Treasurer
Ben Knisely, COL USA (Ret), Secretary
Ms. Linda Long
Dr. Thomas J. McElheny

Absent: F. Steven Herb, Esquire, Vice Chairman; Howard G. Crowell, Jr., LTG USA (Ret), Chairman, SMA Foundation Inc.; Frederick M. Derr, CAPT USN (Ret), Treasurer, SMA Foundation Inc.; Dr. Logan Malone, RADM USN (Ret); Ms. Carter Donovan; Dr. J. Robert Parkinson; SMA-LTC Ryan Lee, Assistant Head of School, Middle School Campus; SMA-CPT Leslie Smith, Athletic Director, Middle School Campus

SMA Administrative Staff in Attendance

SMA-COL Christina Bowman, Executive Director of Schools
SMA-MAJ Steve Kok, Director of Finance
SMA-LTC Frederick Fout, Head of School, High School Campus
SMA-LTC Abby Williams, Assistant Head of School, High School Campus
SMA-LTC Dr. Catherine Rodriguez, Assistant Head of School, High School Campus
LTC Ben Weiss, Commandant of Cadets – Senior Army Instructor (SAI)
SMA-LTC Pamela Donehew, Director of Literacy and IB
SMA-MAJ CJ Bannister, Chief Development Officer, SMA Foundation Inc.
SMA-MAJ Amy Mazner, Athletic Director, High School Campus
SMA-LTC Tom Vara, Head of School, Middle School Campus
SMA-LTC Lisa Currie, Assistant Head of School, Middle School Campus
MAJ Becky Morris, Assistant Head of School, Middle School Campus

Guests: Members of the SMA faculty, staff and PTCC representatives.

SMA-CPT Terri Davis, Staff Representative for Middle School; SMA-CPT Ashley Wyka, Staff Representative for High School; MSG Johnny Browning, Staff Representative for High School; Ms. Michelle Collins, HS PTCC President
Location: SMA High School campus. The chairman called the meeting to order at 2:32 pm.

Motion to Approve the Minutes from the 17 January, 2019 meeting:

COL Ben Knisely motioned for approval of the 17 January, 2019 minutes; Dr. Tom McElheny seconded the motion and the board unanimously approved.

Executive Director of School Report: SMA-COL Christina Bowman discussed the upcoming AdvancEd meetings on the 26th and 27th of February and thanked the board members for volunteering their time to attend. She mentioned the need to complete a strong strategic plan and asked the board to reconsider hiring a consultant for the lengthy process. SMA-COL Bowman stated a grant will be resubmitted to assist in the cost of the consultant. Dr. McElheny suggested choosing a consultant who understands our culture.

SMA-COL Bowman discussed current enrollment and the applications we have for the 2019-2020 school year. She stated a second enrollment window opened through the end of February. Dr. McElheny inquired as to how the board members can assist in enrollment for next year. Chairman Herb Jones asked if we have reached out to our alumni to aid in enrollment in which SMA-MAJ CJ Bannister replied that Donor Perfect is currently being updated for direct mailing.

HR Report: SMA-COL Bowman discussed staff replacements to date and mediation on separate issue has been reached that needs board approval.

Dr. McElheny motioned for approval of mediation provided; COL Knisely seconded the motion and the board unanimously approved.

SMA-COL Bowman discussed the need for board approval for two employees in the Sarasota County Drop Program to remain employed after their fifth year in the program. SMA-MAJ Steve Kok explained the Drop Program is a retirement program an employee can enter at retirement age in which they would need to leave employment after the fifth year. He explained the law had recently changed where the employee does not have to leave employment after the fifth year. SMA-MAJ Kok also explained the new law states the board must approve each employee to remain employed after the fifth year in the Drop Program.

COL Knisely motioned for the approval of two employees in the Drop Program to extend their employment an additional 36 months; Chairman Jones seconded the motion and the board unanimously approved.

SMA Prep Head of School Report: SMA-LTC Tom Vara provided a read-ahead report. He discussed enrollment for next year is doing well and the eighth grade trip to the high school had a great response with continuous efforts to connect the prep and the high school for an easy transition. SMA-LTC Vara mentioned a soft lockdown drill was performed with preparation for a hard lockdown drill in the near future. He stated the security team is continuously working together to ensure confidence in the lockdown procedures.

SMA-LTC Vara discussed concerns on campus such as the sixth grade writing and administering FSA writing practice tests to strengthen their writing performance.

SMA Prep Athletics Report: N/A

MYP: SMA-LTC Lisa Currie provided a read-ahead report. She stated that she and the administrative team are setting a tone of culture for enrollment along with class culture. SMA-COL Bowman commended the administrative teams of both schools for compiling spectacular summaries for AdvancEd.

SMA Head of School Report: SMA-LTC Fred Fout provided a read-ahead report. He discussed the course selection list for incoming ninth graders was mailed home to all prep eighth graders and working with the prep in eighth grade commitments to the high school. SMA-LTC Fout stated his goal is to increase enrollment from the prep to the high school significantly. He also discussed the added required classes to alternate with JROTC for each grade. SMA-LTC Currie stated the need to teach the high school that the IB program is not only for the elite.

SMA HS Athletics Report: Athletic Director Coach Amy Mazner provided a read-ahead report. Coach Mazner stated that all five teams had a GPA of 3.0 and higher and are currently up for an award for this achievement. Chairman Jones inquired if the board are invited to the Winter Sports Banquet in which Coach Mazner replied that they are more than welcome to attend. SMA-LTC Fred Fout commended Coach Mazner on all her efforts and stated the attendance at games are increasing in numbers.

IB Report: SMA-LTC Pamela Donehew provided a read-ahead report. She mentioned the IB Consortia meeting once a month consisting of local schools that participate in the IB program and how it's becoming more accepted. SMA-LTC Donehew encouraged the IB program as a school wide philosophy.

SAI/Commandant's Report: LTC Weiss provided a read-ahead report. He stated receiving additional funds to purchase more uniforms.

Staff Representatives: SMA-CPT Terri Davis provided a read-ahead report for the prep. She reported a few concerns regarding class sizes and discipline issues with cadets. Chairman Jones inquired if any concerns were communicated with the head of school in which SMA-CPT Davis responded that SMA-LTC Vara met with her and asked for staff to offer suggestions. SMA-CPT Davis stated a letter was drafted after her meeting with SMA-LTC Vara. SMA-COL Bowman stated a protocol needs to be put into place allowing administrative team ample time to assess issues and implement changes.

SMA-LTC Vara stated the concerns were first brought to his attention two weeks prior and had already spoken to faculty regarding class sizes. He explained to the board how each core subject is broken down by number of teachers and classes and resulted in a few classes above the optimum number of twenty-two by only a couple of cadets. SMA-LTC Vara mentioned meeting with the math department chair and discussing the math progression, which increased by thirteen points, as the source of a few classes over by a few cadets. He stated his plan to meet with all the department chairs before the end of the school year.

SMA-LTC Vara discussed the discipline issues as minor and not severe enough to withdraw a cadet. He stated he will be meeting with SMA-LTC Ryan Lee on discipline protocol. SMA-COL Bowman stated she will oversee the communication between administration and faculty and protocols put in place for concerns. She iterated that administration may have to make decisions based on charter rules and

what's best for the Academy. Also, she stated the Academy is within compliance of class size standards.

MSG Johnny Browning provided a read-ahead report for the high school. He suggested the administration ranks to be changed to SMA-LTCs as Assistant Heads of Schools, SMA-COLs as Heads of Schools and possibly SMA-GEN as Executive Head of Schools. Chairman Jones and COL Knisely concur with the Heads of Schools rank and will discuss how to change the Executive Director rank. SMA-CPT Ashley Wyka reported the technology issues that happen frequently throughout the day and that other concerns were previously handled by the administration team. SMA-COL Bowman stated she spoke with SMA-MAJ Kok to discuss future technology options based on needs per classroom.

Treasurer's Report: SMA-MAJ Kok provided a read-ahead report and stated expenses are currently down. He discussed the status of upgrading the computers for both schools in which he stated only about half for the high school and less than a quarter for the prep need to be replaced. Chairman Jones inquired of any foreseeable expenses and concerns in which SMA-LTC Fred Fout responded that they are currently concerned with the air conditioner and the infrastructure at the high school. Mr. Kimball Bobbitt commended SMA-MAJ Kok on the research for not having to replace all the computers.

PTCC Report: Ms. Michele Collins had nothing to report. The prep announced a great Valentine's Day dance on the 8th of February.

Foundation, Inc.: SMA-MAJ CJ Bannister mentioned she will be sending the board suggestions on how they can be more supportive and engaged. She stated that the strategic plan is needed to update our giving profile on all community foundations' websites. SMA-MAJ Bannister discussed the current status on the Raiders Rise & Run 5K and the Les Stroud Event partnering with Mote Marine and ShelterBox. She also discussed the January 2020 Gala event and the schedule for the upcoming appeals.

Committee Reports: N/A

Chairman: Chairman Jones emphasized the need to raise funds through appeals and donors.

Old Business: N/A

New Business: N/A

Public Comments: N/A

The chairman adjourned the meeting at 4:29 pm.

Mr. Herb Jones, Chairman

Date

COL Ben Knisely, Secretary

Date

DRAFT

Executive Director of Schools Report

March, 2019

Enrollment:

- Enrollment
 - Meetings remaining; 13 March, 10 April, 1 May

Communication:

- Safety and Security Update
 - 20 February Meeting
- Strategic Plan Update
 - Grant Accepted
 - Consultant Requested
- AdvancED Review
 - Initial Report Positive
- Academy PD; 15 March
 - HS Campus
 - Tech Panel Presentation
- 20 February; Lunch with Mr. Urfer
- Lottery Process

Events:

- 9 March; Circus Sarasota! Guest Ringmaster
- 12 March; Special Formation
- 13 March; Lunch With Donors
- 14 March; "Outbreak" at Prep!
- 18 March; Spring Break Week
- 28 March; Prayer Breakfast
- 4-7 April; Rotary Youth Leadership Awards Camp
 - Lake Placid, FL
- 26 April; Les Stroud/Survivorman Concert
 - VIP Kayak Tour with Les Stroud; 25 April

Ongoing Concerns:

- Parking
- Enrollment
- School Grade
- Staffing

Head of School Report
for February, 2019

Enrollment

Grade 6: 211

Grade 7: 194

Grade 8: 180

Total: 585

Campus Life/Events

-2/4-College shirt day

-2/5-Project Inspire WebEx with Jayde Loviello

-2/6-Ambassadors visited Tatum Ridge Elementary School

-2/7-Full lockdown drill during formation

-2/8-Valentine's Dance

-2/13-7th-grade promotion

-2/14-Board of Directors meeting @ HS 2:30

-2/18-No School

-2/19-6th-grade promotion

-2/22-Severe weather drill-period 2

-2/25-AdvancED on Prep campus

Cadet Highlights

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

Military Studies: Kimberly Jardeniz-Placencia

Physical Education: Amadea Donatelli

Boys + Girls Soccer: Alexia Vance

Luke Williams

Andrew Ledford

Isiah Montesdeoca

Johan Ortiz

Faculty/Staff Highlights

- Attached

Parent and Community Highlights

-Prep enrollment meeting February 6th + 27th - 8:30 in café

Security

A severe weather drill and a full lockdown drill was conducted. The full lockdown was completed during formation. Last month we started with a soft lockdown at formation and moved to the next step with a full lockdown. Cadets were given directions where to go and the plan was executed very well. The safety team convened to debrief from the drill and one important change was made. Instead of lining our teachers behind the cadets during formation, the teachers will stand near their classroom doors facing the flag pole. The reason is to get our teachers to the classroom doors quickly to allow cadets to enter safely.

Attention Items:

-February 19-March 1: We piloted a homeroom program to supply cadets with more information in addition to the morning news. This homeroom time consisted of IB MYP information, Organizational time, Guidance topics, Upcoming events, and discussion circles. We are currently gathering information from our staff to determine what worked and what can added to make the program more effective. We are planning on moving forward with the updated program the start of the new school year.

-Board meeting update. I have met with several department heads and teachers to discuss the class size and discipline issues. We brainstormed some ideas to move forward for next school year. We discussed this information at a faculty meeting on Tuesday morning March 5th.

-The Interact Club received confirmation the well for South Sudan was completed with the SMA name.

-Preparing for FSA state exams

**You're invited to attend the 4th Annual Operation Outbreak (O2)
coming to SMA Prep campus Thurs., March 14th, 2019**

This year's infectious disease simulation will combine technology and real world, outbreak scenarios never combined before in this way. The project has grown exponentially since it first began 4 years ago and is becoming a simulation model for infectious disease in education and health around the world.

Speakers (9:45 AM-12 PM)

Lunch (12 PM - 1:30 PM)

Outbreak (2:00 PM - 4:00 PM)

We are supported with grants/funding

Upcoming Events to support SMA's Project Earth:

Project Earth Day April 24th Prep campus

We will have a schedule of in person and webx speakers. At lunch we've lined up several booths that will be set up. Cadets will have a passport to show who they connected with and there be a reflection at the end of the day.

Survivorman, Les Stroud, in his 2nd annual live performance of *An Evening of Songs and Storytelling* at Bayside Community Church East Campus, 8200 Bee Ridge Rd Sarasota on Saturday, April 26th, 7:00pm – 9:30pm. (\$20 for SMA staff and students)

VIP Kayak Experience with Survivorman on Lido Key through Paradise Adventures on April 25th. Tickets to both events can be purchased at SarasotaMilitaryAcademy.com.

STAFF ACKNOWLEDGEMENT

PTCC

Coordinating our Valentine's Day Dance

Jackie Sharkey-Trecartin

Raider 5K Run

Interact Club

The Well for South Sudan Completed

Audrey Benitez

Ambassadors to Elementary Schools

Todd Brown

To Speak at the IB World Conference

Laura Munson

Assisting with New Science Instructors

Coaches/Clubs

No new sports or clubs at this time

SMAP ATHLETICS REPORT

Girls Soccer:

The girls closed out their season finishing 3-4-1. The team will definitely build on their youth for next year. Coach Sanders plans to reach out to the new 6th graders next year early in the fall to generate interest.

JV Soccer:

The JV soccer team was created due to the large turnout seen in both boys and girls tryouts. None of the other schools in the league had a JV team but we were able to schedule games with the Varsity teams in the 1A division. The league dictates that coed teams must play other coed teams or if none are available they are required to play an "all male" team which we did all season. Coach Ian Snell, the girls High School soccer coach, helped us out tremendously by stepping in and taking on this team. Their record ended up 2-3.

Boys Soccer:

The boys finished the regular season 7-0-1 making them the #1 seed in the FSCL playoffs. As the #1 seed we hosted Rowlett Academy the #4 seed and won 3-0. Upon winning this game we hosted our arch rival SSAS and ended up tied 2-2. The Eagles fell short in the shootout 5-4 making them the FSCL runner up. This trophy is on display in the front office.

Golf:

The golf schedule is now finalized and published. Prep tryouts will be March 12th and 13th at Tatum Ridge Golf Links. After assessing golfers at the driving range, pitching area and putting green, Coaches Smith and Biroscak will form a team of approximately 6 golfers from all three grades, 6, 7 and 8. The Coaches are anticipating another championship season this year.

Jr. Raiders:

The Jr. Raiders will have an outing March 16th at Tree Umph. On March 30th the group will travel to Imagine North Port for a fun meet.

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

From: SMA-LTC Fout, Frederick T., Head of School
Sarasota Military Academy
801 North Orange Avenue
Sarasota, Florida 34236



Date: 07 March 2019

Re.: Board Report for Regular Sarasota Military Academy Board Meeting on
Wednesday, 14 March 2019

Enrollment: (as of 07 March 2019)

- Freshmen - 218
- Sophomores - 189
- Juniors - 165
- Seniors - 171
- TOTAL - 743

Accomplishments:

- The AdvancEd External Review visit was a grand success. Thank you to the many individuals and teams that made this event a success, especially SMA-LTC Pamela Donehew
- Scheduling has begun and will be concluded for SY 2019/2020 at all grade levels prior to the beginning of Spring Break
- Provided faculty and full staff monthly informational meetings
 - Met with full faculty and staff to recognize staff and faculty accomplishments, discuss data and progress monitoring, scheduling procedures and monitoring for the next school year, policy and procedure committee work, daily operations, upcoming events and preparations for SY 2019/2020
- Participated in multiple school leadership meetings with SMA-HS Administrative Leadership regarding
 - Scheduling and Teacher Assignments for SY 2019/2020
 - PRIDE Evaluation compliance
 - Staff, Faculty and Cadet Recognitions
 - School Schedule for SY 2019/2020
 - School discipline
 - Upcoming events
- Met with Instructional Leadership Team (ILT), to include Administration, Program Directors, and Department Chairs, to clarify and update on

- SY 2019/2020 scheduling and teaching assignments
- SY 2019/2020 cadet assignments in compliance with course prerequisites
- Department and Professional Learning Community meeting expectations
- School Wide Student Support Team
- Positive Behavioral Interventions and Support - PBIS and Discipline
- Attended Wrestling and Lacrosse games
- Weekly meetings with Commandant
- Weekly meetings with Administrative Team
- Met with PTCC President to discuss Academy initiatives, AdvancEd representation of parents and community members, and parent contact strategies
- Daily working lunch meetings with Administrative Team, schedule permitting
- Multiple PRIDE evaluation classroom observations
- Multiple classroom walkthrough observations and Presence Patrols
- Met with prospective cadets and parents for intake procedures prior to enrollment
- Multiple meetings with individual Teachers, Parents, and Cadets regarding issues related to cadet success at SMA

On-Going Projects:

- Organizational chart development for the High School campus, to include job descriptions, expectations, and chain of command
- SMA specific policy and procedure development to clearly and transparently communicate mission and vision of the academy. Topics of discussion include an SMA policy on Hate Language, Sexual Harassment and Assault, Bullying, revisions and clarification of the policies and procedures in the Cadet Handbook, and development of a technology plan
- Review of Programs for maximum enrollment and accessibility for our diverse cadet population
 - Vertical alignment between programs within the school and from Prep to SMA
 - Enhancement in Tier II and Tier III interventions for Intensive Language Arts
 - Development of instructional centers to meet diverse needs of all students
 - Enhanced Career Acceleration opportunities for cadets
 - Revision of Course Descriptions to include industry certification opportunities
- Review of Programs for new opportunities to meet our expanding diverse cadet population
 - Development pending for course alignments to meet FL requirements for the Pharmacy Technician certification to begin potentially in SY 2019/2020
 - Job Shadowing Program presentation for cadets held on Friday, March 8th with upcoming agreements with cadets to begin shadowing upcoming
- Continued evaluation of certified and non-certified personnel using the PRIDE protocol
- Continued classroom walkthroughs using the SMA Observation Protocol
 - Individualized walkthroughs focused on the Protocol and leading to Feedback and Coaching

- Individualized walkthroughs focused on the PRIDE indicators and annual observations

Upcoming Events:

- Blood Drive, March 7 and 8 during the school day
- Girls and Boys Lacrosse @ Calvary Christian, March 8 from 1730-2100 pm
- Drill Meet (Area 5) @ Riverview, March 9 beginning at 0700
- Drumline Performance for Drill Meet (Area 5) @ Riverview, March 9 at 0800
- Special Formation, March 12 at 1110
- Charter Coalition Meeting @ Suncoast Academy on March 12 at 1300
- Girls Lacrosse @ Cardinal Mooney, March 12 at 1800
- Enrollment Information Meeting, March 13 at 0700
- Boys Lacrosse home vs Cardinal Mooney, March 13 at 1700
- Boys and Girls Lacrosse home vs Manatee, March 14 at 1800
- NO SCHOOL, Professional Development for Staff and Faculty at SMA HS, March 15
- NO SCHOOL, Spring Break, March 18-22
- Rifle Team National Championships at Camp South, Alabama, March 20-24
- Manatee Tiger Bay @ PIER 22 Restaurant, Bradenton, March 21 from 1115-1300
- Interact Club Pennies for Patients, March 25-April 12 **DONATE YOUR PENNIES HERE!**
- Senior Beach Day, March 25
- Girls Lacrosse @ Venice, March 27 at 1730
- Boys Lacrosse home vs Venice, March 27 at 1900
- Girls Lacrosse home vs Immokalee, March 28 at 1730
- Girls Lacrosse home vs Riverview, March 29 at 1730
- Boys Lacrosse at North Port, March 29 at 1800
- Drill Meet - Army Nationals at Richmond, VA, March 30
- Girls Lacrosse home vs Cardinal Mooney, April 2 at 1730
- Boys Lacrosse at St. Pete Catholic, April 2 at 1900
- Rifle Team Regional Championships at Camp South, Alabama, April 3-7
- Tiger Bay Sarasota, April 4 at 1000
- Girls and Boys Lacrosse at Riverview, April 4 at 1730
- JSA Annual **TALENT SHOW & SILENT AUCTION**, April 4 at 1830
- Senior Grad Bash at Universal Studios, April 5th
- State Drill Meet in Lakeland, April 6
- HS PTCC Meeting, April 9 at 1800
- Enrollment Meeting, April 10 at 0700
- Boys Lacrosse home vs Issaquah, April 10 at 1900

SMA ATHLETICS REPORT

3/11/19

WRESTLING

We could not be more proud of our Wrestling Team and Coaches! Saturday March 2nd, Coach Arrington and Coach Browning had 9 wrestlers competing for a Regional Championship...with schools twice our population size we are Regional Runner Up and sending 5 to States this coming week!

Wrestlers are a rare breed and the dedication is ridiculous! All of the wrestlers contribute to this accomplishment! Alyssa Villa-Mosqueda competed last week for the Girls Wrestling States and finished 6th. What Coach Arrington has accomplished in such a short period of time needs to be highly commended and applauded! Thank you Major Arrington for your passion, dedication and tutelage!

This past weekend, 5 wrestlers advanced to States: Garrett Murphy, Mason Marchbank, Sean Cervin, Erik Borresen and Niko Gyorgy. Sean Cervin finished 6th in State in 1A!!!! Sean also has a 3.8 GPA and served honorably as the Team Captain.

On top of a Runner Up Regional finish and their State run...our wrestling team finished 16th in ALL of 1A class schools for their overall Team GPA! This team is doing it all folks, on the mat, fund raising, in the weight room and in the classroom!!! Exactly what SMA is all about!

BOYS LACROSSE –& GIRLS LACROSSE -

Games are underway and the building and changing of culture continues!

WINTER ACADEMIC TEAM CHAMPIONS

SMA Team	Classification & Finished	GPA	Schools in Classification
Boys Basketball	5A – 11 th	3.246	72
Girls Basketball*	5A – 10 th	3.555	72
Girls Soccer	2A – 26 th	3.378	99
Wrestling	1A – 16 th	3.085	106

What is the FHSAA Academic Team Champion Program?

The FHSAA Academic Team Champion recognition program honors teamwork not only in competition, but in the classroom as well. The program recognizes teams in each of the Association's sanctioned and recognized sports, naming an Academic Team Champion in each classification. For the 2018-19 school year, the 698 member senior high schools have been divided into nine classifications for administrative purposes based on the enrollments submitted.

The team aggregate cumulative GPA is submitted for nomination. To figure the cumulative team GPA, a school would take the grades of each student-athlete and figure them the same way the individual's GPA is determined (i.e., point values for the grades are totaled and divided by the total number of hours taken). GPAs must be rounded off to the nearest thousandth (e.g., 3.214). Only student-athletes' GPAs may be used. Team managers, statisticians or student trainers should not be included when computing the team GPA.

Fall teams use the previous spring semester cumulative unweighted GPA. Winter and spring teams use the first semester cumulative unweighted GPA. Freshman grades are not included in GPA for fall sports since they do not have a previous high school cumulative GPA, unless the freshman received credit toward graduation in classes taken below the ninth grade and then only in those classes for which such credit was received.

IB DP & MYP Board Report
3/12/20

During the AdvancEd accreditation summation report, one need identified is to work toward unifying the two schools. In an effort to meet that recommendation to operate as one Academy, MYP and DP are collaborating to combine the IB Board Reports. Another strong recommendation in the summation was the need to create an image that would lessen the misconception of “who SMA is.” Additionally, the team suggested an Academy-wide emphasis on being an IB World School. Since IB is a respected academic program recognized worldwide, and we have already invested in and committed to IB, by simply adding the term “International Baccalaureate World School” under our school name would take away the misconception that “military” means “reform school.” There was also a suggestion to include IB verbiage in the mission statement and include some of the learner profile characteristic terms along with respect, honor and integrity.

MYP

- Dr. Todd Brown has been invited to speak at the IB Global Conference in New Orleans this summer to showcase The Inspire Project.
 - Enhanced global exposure for SMA
 - Networking and reach of The Inspire Project offers further opportunities for SMA to be the pioneering school for this program
- Attended SRQ Media's ProjecThink Conference which is sponsored by Ringling College of Art and The Education Foundation of Sarasota County
 - Focus on 21st century skill building and design thinking
 - Creativity needs more cultivation in K12 for success in an AI and VR world

DP

- SMA applied and has been accepted to participate in Amazon Future Engineer Program in partnership with Edhesive. (Ltr. attached)
 - The Amazon Future Engineer program initiative seeks to dramatically expand access to high caliber preparatory courses, curricular resources,

and programs to help prepare and propel high school students forward in their pursuit of AP & IB Computer Science education.

- With a special focus on students in lower-income communities and in states that have made computer science education a clear priority, the Amazon Future Engineer sponsorship opportunities are available for schools offering AP & IB Computer Science.
- IB Odyssey of the Mind Team - has won the regional competition and is now moving on to the State competition on April 5th, in Orlando. Look at "World Competition" here we come again.

Actionable Items

Immediate:

- Include IB World School logo on the permanent navigation bar on the main site
- Include IB World School recognition in the "About Sarasota Military Academy" on press releases to include, "Founded in 2002, Sarasota Military Academy (SMA) is a public charter, International Baccalaureate (IB) World School with two campuses located in Sarasota, Florida."
- IB Coordinators will refine the IB World School page on website
- Make IB more visible on campuses
 - Banners etc.

Ongoing

- Begin to align skills-based articulation (ATL in MYP) from 6th grade through 10th grade
 - ATL skills categories (21st century skill building)
- Embed skill-building articulation when developing the technology plan
 - Digital/tech skill building
 - ePortfolios
- Continue to educate parents and community about current trends in middle school education which are already a part of the MYP framework.
 - Continue with the "Learning in Action" series through the newsletter and social media

- Develop a content marketing flow using Constant Contact and current enrollment lists
- Analyze survey results specific to the MYP from cadets, parents, and teachers to inform areas to further clarify or communicate more effectively
- Committee has been formed to write syllabus and curriculum for Pre-IB Inquiry Skills for 9th grade.



International Baccalaureate
World School

March 12, 2019

Dear Families:

Congratulations! Sarasota Military Academy has been selected to participate in the *Amazon Future Engineer Program*, a program that will be offered in the 2019-2020 academic year in partnership with Amazon and Edhesive. A cornerstone of this program is a new course, AP/IB Computer Science, which helps students develop a foundational understanding in core computer science and programming concepts.

We are thrilled to offer this new program, which will prepare students for a technological world. Whatever field our students choose to go into as adults, their ability to succeed will increasingly hinge upon understanding how technology works, in addition to their ability to problem solve, reason, and think creatively. Only a fraction of students are learning computer science, and fewer study it today than a decade ago. This two-year course, taught by SMA-CPT Daniel Goodman, former NASA scientist, is designed to inspire students in computer science and develop their understanding of how technology and computer science can impact and shape our world. Students can take this course as part of the IB program, or as an IB STEM Course Taker.

Encourage your student to sign up for this exciting program. This opportunity can open up collaboration, creativity, and passion – and help unlock a new future for students as they learn and build together.

Students may register for this program by contacting SMA-LTC Pamela Donehew at pamela.donehew@oursma.org, by May 1, 2019.

Sincerely,

SMA-LTC Pamela Donehew
Director of IB



Sarasota Military Academy

8 March 2019

From: Ashley Wyka
Faculty Representative

Memorandum for: SMA-COL Christina Bowman/SMA-LTC Fredrick Fout / Admin Staff

SUBJECT: Concerns Expressed by Various Members of the SMA Faculty

Good afternoon, here are the comments that were presented to MSG(Ret) Johnny Browning and myself for the upcoming board meeting. Please let us know what is being/has been addressed at the local admin level, and what needs to be brought up at the board itself.

A concern about smart watches was brought up. A few teachers have expressed their concerns with cadets using their smart watch, such as an iWatch as phone, to text and access social media. The question was can we take away their smart watch? And what if they say they were just checking the time even though they were clearly doing something else? They also receive notifications to their smart watch which in itself can be a distraction to cadets.

Ashley Wyka
Faculty Representative

SARASOTA MILITARY ACADEMY

Commandant
801 North Orange Avenue
Sarasota, Florida 34236

07 March 2019

MEMORANDUM FOR GOVERNING BOARD, SARASOTA MILITARY ACADEMY

THROUGH EXECUTIVE DIRECTOR OF SCHOOLS

SUBJECT: Significant Activities Report

Significant activities past thirty days:

- Color Guard ,19 February @ Sarasota County School Board
- Color Guard for Orioles opening game, 23 February @ Orioles Stadium
- Honor Guard 01 March @ Sarasota Yacht Club "Sundown Ceremony"
- JROTC Instructors begin advanced curriculum training 04 March @ Ft Knox, Ky
- Reserve Officer's Association Cadet Awards Banquet, 06 March
- District Drill Competition @ Riverview High School
- Raider's Rappel Day @ Booker High School
- Jewish War Veteran's Awards Banquet, 09 March
- Drill Team competes Area 5 Competition 09 March @ Riverview High School
- Present Alabama State Instructors Rappel Certification @ Cullman, Al
- Color Guard for Publix Service Awards, 14 March @ IMG

Significant activities next thirty days:

- Civilian Marksmanship Program regional competition 27 March
- Admissions Visit to the United States Military Academy at West Point , 28-31 March
- Color Guard 28 March for Sarasota Prayer Breakfast @ Hyatt
- Honor Guard 05 April @ Sarasota Yacht Club "Sundown Ceremony"
- Present Georgia State Instructors Rappel Certification, 09, 10 April @ Ft Stewart and Milledgeville (GMC), Ga
- State Drill Competition, 13 April @ George Jenkins High School, Lakeland, Fl

"One School, Two Campuses"!

Respectfully,

Ben Weiss

Ben Weiss
Lieutenant Colonel (Retired), Special Forces
Commandant

Sarasota Military Academy
Balance Sheet- By Campus
As of January 31, 2019

	HS	Prep	Total
ASSETS			
Current Assets			
Bank Accounts			
1110 Cash and cash equivalents			
1109 Petty Cash	400	400	800
1111 WF Operating Account	147,753		147,753
1113 SMA PTCC Account	27,188		27,188
1116 WF Advancement Account	80,777		80,777
1117 WF Credit Card Machine	17,012		17,012
1118 WF Business Market Savings	329,953		329,953
1119 SMA Prep Checking		102,235	102,235
1120 Athletics Account	63,234		63,234
1121 WF Prep PTCC Account		36,901	36,901
1123 Prep CC Machine		19,790	19,790
1124 SMA Wreaths	3,778		3,778
Total 1110 Cash and cash equivalents	\$ 670,096	\$ 159,326	\$ 829,421
8-1111 Sport Team Bank Accounts	71,601		71,601
Total Bank Accounts	\$ 741,697	\$ 159,326	\$ 901,022
Other Current Assets			
1130 Accounts Receivable		4,780	4,780
1160 Stifel Reserve	127,858		127,858
1220 Due from Other Governments			
1221 A/R ROTC	30,027		30,027
1222 A/R Due from District	103,402	61,862	165,263
Total 1220 Due from Other Governments	\$ 133,428	\$ 61,862	\$ 195,290
Total Other Current Assets	\$ 261,286	\$ 66,642	\$ 327,928
Total Current Assets	\$ 1,002,983	\$ 225,967	\$ 1,228,950
Fixed Assets			
1300 Fixed Assets			
1310 Land	973,750	7,424,550	8,398,300
1320 Land Improvements	73,227	42,750	115,978
1330 Building & Improvements	11,656,758	2,017,648	13,674,406
1340 Furniture, Fixtures & Equipment	1,570,551	360,350	1,930,900
1350 Motor Vehicles	535,364	232,835	768,199
1370 Capital Lease Equipment	53,300		53,300
1380 Audio-visual Material & Softwar			
1381 Audio-visual Materials	1,504		1,504
1382 Computer Software		93,386	93,386
Total 1380 Audio-visual Material & Softwar	\$ 1,504	\$ 93,386	\$ 94,890
1390 Computer Equipment	119,588	399,901	519,489
Total 1300 Fixed Assets	\$ 14,984,042	\$ 10,571,419	\$ 25,555,461

1550 Accumulated Depreciation			
1329 AD- Land Improvements	(39,979)	(12,561)	(52,540)
1339 AD- Buildings & Improvements	(2,740,327)	(197,846)	(2,938,173)
1349 AD- Furniture, Fixtures & Equip	(1,334,214)	(200,716)	(1,534,930)
1359 AD- Motor Vehicles	(317,806)	(70,965)	(388,771)
1379 AD- Capital Lease Property	(53,300)		(53,300)
1389 AD- Computer Software	(30,744)	(364,764)	(395,508)
1399 AD - Audio Visual	(201)		(201)
Total 1550 Accumulated Depreciation	\$ (4,516,572)	\$ (846,851)	\$ (5,363,423)
Total Fixed Assets	\$ 10,467,470	\$ 9,724,568	\$ 20,192,038
Other Assets			
1625 Due From SMA Prep - Long-term	2,149,449	(2,149,449)	0
1626 Due from Foundation	116,908		116,908
Total Other Assets	\$ 2,266,357	\$ (2,149,449)	\$ 116,908
TOTAL ASSETS	\$ 13,736,809	\$ 7,801,086	\$ 21,537,895
LIABILITIES AND EQUITY			
Liabilities			
Current Liabilities			
Accounts Payable			
2120 Accounts Payable	33,038	15,808	48,846
Total Accounts Payable	\$ 33,038	\$ 15,808	\$ 48,846
Credit Cards			
2150 Wells Fargo Visa CC	1,199		1,199
2151 Carmen Diaz	33		33
2152 Stephen Kok	43,143		43,143
2153 Monika Chenkus	571		571
2155 Kevin Nasby	1,395		1,395
2156 Christina Bowman	819		819
2161 Pamela Donehew	997		997
2163 Amy Mazner	565		565
2164 Donna Hoefer HS	308		308
Total 2150 Wells Fargo Visa CC	\$ 49,028	\$ -	\$ 49,028
2180 Wells Fargo SMA Prep Visa CC			
2181 Pam Hammond		19	19
2183 Stephen Kok		17,242	17,242
2186 Betty Bultemeier		1,184	1,184
2191 Lisa Currie		2,018	2,018
2193 Beth Harris		46	46
Total 2180 Wells Fargo SMA Prep Visa CC	\$ -	\$ 20,510	\$ 20,510
Total Credit Cards	\$ 49,028	\$ 20,510	\$ 69,538
Other Current Liabilities			
2110 Accrued Payroll			
2112 Accrued Payroll	248,443	180,648	429,090
Total 2110 Accrued Payroll	\$ 248,443	\$ 180,648	\$ 429,090
2170 Accrued Payroll Liabilities	7,252	4,611	11,863
2200 Other Current Liabilities			
2230 Current Portion of LTD	155,000	441,314	596,314

Total 2200 Other Current Liabilities	\$	155,000	\$	441,314	\$	596,314
8-2290 Funds Held on Behalf of Others		71,601				71,601
Total Other Current Liabilities	\$	482,296	\$	626,572	\$	1,108,869
Total Current Liabilities	\$	564,362	\$	662,890	\$	1,227,252
Long-Term Liabilities						
2320 Bonds Payable						
2323 Educational Bond - 2012		4,555,000				4,555,000
2326 Prep Bond Payable - \$7.5M				6,450,787		6,450,787
2327 Prep Bond Payable - \$1M				870,065		870,065
2328 Wells Fargo Equipment Loan for Building 5				67,554		67,554
Total 2320 Bonds Payable	\$	4,555,000	\$	7,388,406	\$	11,943,406
2330 Accrued Vacation		18,307				18,307
2380 Interest Rate Swap		252,844				252,844
2410 Deferred Revenues		41,681		(41,681)		0
Total Long-Term Liabilities	\$	4,867,832	\$	7,346,725	\$	12,214,557
Total Liabilities	\$	5,432,194	\$	8,009,616	\$	13,441,810
Equity						
3010 Invested In Capital Assets, Net		5,684,547		1,846,620		7,531,166
3020 Temporarily Restricted Net Assets		73,001		13,911		86,911
3030 Unrestricted Net Assets		2,601,289		(1,925,235)		676,054
Net Income		(54,221)		(143,825)		(198,046)
Total Equity	\$	8,304,615	\$	(208,530)	\$	8,096,086
TOTAL LIABILITIES AND EQUITY	\$	13,736,809	\$	7,801,086	\$	21,537,895

Sarasota Military Academy
Profit and Loss - Monthly - By Campus
January 2019

	HS	Prep	Total
Income			
3100 Federal Direct	30,027		30,027
3300 Revenue from State Sources	372,436	426,884	799,320
3400 Revenue from Local Sources	164,742	108,695	273,437
Total Income	\$ 567,204	\$ 535,579	\$ 1,102,783
Gross Profit	\$ 567,204	\$ 535,579	\$ 1,102,783
Expenses			
4100 Salaries	445,398	307,584	752,982
4200 Employee Benefits	96,322	75,724	172,046
4300 Purchased Services	71,491	59,400	130,890
4400 Energy Services	13,812	3,658	17,470
4500 Materials & Supplies	24,371	4,112	28,483
4600 Capital Outlay	17,295	5,740	23,035
4700 Other Expenses	82,500	47,300	129,800
Total Expenses	\$ 751,189	\$ 503,518	\$ 1,254,707
Net Operating Income	\$ (183,985)	\$ 32,060	\$ (151,924)
Net Income	\$ (183,985)	\$ 32,060	\$ (151,924)

Sarasota Military Academy
Profit and Loss - YTD - By Campus
July 2018 - January 2019

	HS	Prep	Total
Income			
3100 Federal Direct	212,067		212,067
3200 Federal Through State & Local	(800)	(800)	(1,600)
3300 Revenue from State Sources	3,124,394	2,265,134	5,389,527
3400 Revenue from Local Sources	1,678,889	932,011	2,610,900
Total Income	\$ 5,014,550	\$ 3,196,345	\$ 8,210,895
Gross Profit	\$ 5,014,550	\$ 3,196,345	\$ 8,210,895
Expenses			
4100 Salaries	2,875,705	1,918,892	4,794,597
4200 Employee Benefits	648,894	491,633	1,140,526
4300 Purchased Services	558,406	397,105	955,511
4400 Energy Services	77,138	73,384	150,523
4500 Materials & Supplies	200,627	92,336	292,963
4600 Capital Outlay	51,312	51,288	102,601
4700 Other Expenses	656,688	315,532	972,220
Total Expenses	\$ 5,068,771	\$ 3,340,170	\$ 8,408,941
Net Operating Income	\$ (54,221)	\$ (143,825)	\$ (198,046)
Net Income	\$ (54,221)	\$ (143,825)	\$ (198,046)



Established 1972

Kerkering, Barberio & Co.
Certified Public Accountants

February 15, 2019

Sarasota Military Academy, Inc.
801 North Orange Avenue
Sarasota, FL 34236

Enclosed are the original and one copy of the 2017 Exempt Organization return, as follows...

2017 Form 990

"Client Copy" and this instruction sheet are for your files. Because part or all of the data contained in the returns are based on information you furnished, but not verified by us, we ask that you review the returns immediately to ensure that they are correct to the best of your knowledge. If you have any questions, please contact us promptly.

Please follow the filing instructions on the Filing Instruction Sheets attached to your copy of each return. The copy should be retained for your files.

Kerkering, Barberio, & Co.

TAX RETURN FILING INSTRUCTIONS

FORM 990

FOR THE YEAR ENDING

June 30, 2018

Prepared for	Sarasota Military Academy, Inc. 801 North Orange Avenue Sarasota, FL 34236
Prepared by	Kerkering, Barberio & CO. P.O. Box 49348 Sarasota, FL 34230-6348
Amount due or refund	Not applicable
Make check payable to	Not applicable
Mail tax return and check (if applicable) to	Not applicable
Return must be mailed on or before	Not applicable
Special Instructions	This return has qualified for electronic filing. After you have reviewed the return for completeness and accuracy, please sign, date and return Form 8879-EO to our office. We will transmit the return electronically to the IRS and no further action is required. Return Form 8879-EO to us by May 15, 2019.

***** THIS IS NOT A FILEABLE COPY *****

**IRS e-file Signature Authorization
for an Exempt Organization**

OMB No. 1545-1878

Form **8879-EO**

Department of the Treasury
Internal Revenue Service

For calendar year 2017, or fiscal year beginning JUL 1, 2017, and ending JUN 30, 2018

▶ **Do not send to the IRS. Keep for your records.**

▶ **Go to www.irs.gov/Form8879EO for the latest information.**

2017

Name of exempt organization

Employer identification number

SARASOTA MILITARY ACADEMY, INC.

65-1149763

Name and title of officer

HERB JONES

CHAIRMAN

Part I Type of Return and Return Information (Whole Dollars Only)

Check the box for the return for which you are using this Form 8879-EO and enter the applicable amount, if any, from the return. If you check the box on line 1a, 2a, 3a, 4a, or 5a, below, and the amount on that line for the return being filed with this form was blank, then leave line 1b, 2b, 3b, 4b, or 5b, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. **Do not** complete more than 1 line in Part I.

1a Form 990 check here ▶ <input checked="" type="checkbox"/>	b Total revenue, if any (Form 990, Part VIII, column (A), line 12)	1b 15,045,487.
2a Form 990-EZ check here ▶ <input type="checkbox"/>	b Total revenue, if any (Form 990-EZ, line 9)	2b
3a Form 1120-POL check here ▶ <input type="checkbox"/>	b Total tax (Form 1120-POL, line 22)	3b
4a Form 990-PF check here ▶ <input type="checkbox"/>	b Tax based on investment income (Form 990-PF, Part VI, line 5)	4b
5a Form 8868 check here ▶ <input type="checkbox"/>	b Balance Due (Form 8868, line 3c)	5b

Part II Declaration and Signature Authorization of Officer

Under penalties of perjury, I declare that I am an officer of the above organization and that I have examined a copy of the organization's 2017 electronic return and accompanying schedules and statements and to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the organization's electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the organization's return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the organization's federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the organization's electronic return and, if applicable, the organization's consent to electronic funds withdrawal.

Officer's PIN: check one box only

☒ I authorize **KERKERING, BARBERIO & CO.** to enter my PIN **24367**
ERO firm name Enter five numbers, but do not enter all zeros

as my signature on the organization's tax year 2017 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

☐ As an officer of the organization, I will enter my PIN as my signature on the organization's tax year 2017 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Officer's signature ▶ ******* THIS IS NOT A FILEABLE COPY ***** Date ▶ _____

Part III Certification and Authentication

ERO's EFIN/PIN. Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN.

65021619908

Do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2017 electronically filed return for the organization indicated above. I confirm that I am submitting this return in accordance with the requirements of **Pub. 4163**, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature ▶ _____ Date ▶ _____

**ERO Must Retain This Form - See Instructions
Do Not Submit This Form to the IRS Unless Requested To Do So**

LHA For Paperwork Reduction Act Notice, see instructions.

Form **8879-EO** (2017)

723051 10-11-17

13050215 759428 24367

2017.05030 SARASOTA MILITARY ACADEMY, 24367__1

EXTENDED TO MAY 15, 2019

Form **990****Return of Organization Exempt From Income Tax**

OMB No. 1545-0047

Department of the Treasury
Internal Revenue Service

Do not enter social security numbers on this form as it may be made public.

Go to www.irs.gov/Form990 for instructions and the latest information.**2017**
Open to Public
Inspection**A** For the 2017 calendar year, or tax year beginning **JUL 1, 2017** and ending **JUN 30, 2018****B** Check if applicable:

- ☐ Address change
☐ Name change
☐ Initial return
☐ Final return/terminated
☐ Amended return
☐ Application pending

C Name of organization**SARASOTA MILITARY ACADEMY, INC.**

Doing business as

Number and street (or P.O. box if mail is not delivered to street address) Room/suite

801 NORTH ORANGE AVENUE

City or town, state or province, country, and ZIP or foreign postal code

SARASOTA, FL 34236**F** Name and address of principal officer: **HERB JONES****SAME AS C ABOVE****D** Employer identification number**65-1149763****E** Telephone number**(941) 926-1700****G** Gross receipts \$ **15,045,487.****H(a)** Is this a group returnfor subordinates? ☐ Yes ☒ No**H(b)** Are all subordinates included? ☐ Yes ☐ No

If "No," attach a list. (see instructions)

H(c) Group exemption number**I** Tax-exempt status: ☒ 501(c)(3) ☐ 501(c)() (insert no.) ☐ 4947(a)(1) or ☐ 527**J** Website: **WWW.SARASOTAMILITARYACADEMY.ORG****K** Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other**L** Year of formation: **2002** **M** State of legal domicile: **FL****Part I Summary**

Activities & Governance	1	Briefly describe the organization's mission or most significant activities: SEE SCHEDULE O		
	2	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3	Number of voting members of the governing body (Part VI, line 1a)	3	9
	4	Number of independent voting members of the governing body (Part VI, line 1b)	4	9
	5	Total number of individuals employed in calendar year 2017 (Part V, line 2a)	5	252
	6	Total number of volunteers (estimate if necessary)	6	55
	7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.
7b	Net unrelated business taxable income from Form 990-T, line 34	7b	0.	
Revenue	8	Contributions and grants (Part VIII, line 1h)	Prior Year 295,999.	Current Year 188,024.
	9	Program service revenue (Part VIII, line 2g)	13,314,365.	14,673,491.
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	2,352.	1,603.
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	85,964.	182,369.
	12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	13,698,680.	15,045,487.
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	0.	19,167.
	14	Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	9,262,534.	9,925,419.
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
	b	Total fundraising expenses (Part IX, column (D), line 25)	0.	
17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	4,090,559.	4,416,917.	
18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	13,353,093.	14,361,503.	
19	Revenue less expenses. Subtract line 18 from line 12	345,587.	683,984.	
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	Beginning of Current Year 25,003,345.	End of Year 25,744,386.
	21	Total liabilities (Part X, line 26)	21,044,577.	21,401,409.
	22	Net assets or fund balances. Subtract line 21 from line 20	3,958,768.	4,342,977.

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer		Date	
	HERB JONES, CHAIRMAN Type or print name and title			
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> self-employed PTIN
	REBECCA U. STONER			P00585910
	Firm's name KERKERING, BARBERIO & CO.	Firm's EIN 59-1753337		
	Firm's address P.O. BOX 49348			
	SARASOTA, FL 34230-6348			Phone no. 941-365-4617

May the IRS discuss this return with the preparer shown above? (see instructions)

☒ Yes ☐ No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III

☒**1** Briefly describe the organization's mission:

COMBINING EXTRAORDINARY ACADEMICS WITH THE HIGHEST MILITARY PRINCIPLES OF CAMARADERIE, FOCUS, LEADERSHIP, INTEGRITY, COMPASSION, POISE, HONOR AND RESPECT, SMA'S MISSION IS TO GRADUATE YOUNG MEN AND WOMEN WHO WILL CONFIDENTLY DEFINE THEIR PERSONAL AND UNIQUE GOALS FOR SUCCESS IN A

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?☐ Yes ☒ No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services?☐ Yes ☒ No

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.

Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code:) (Expenses \$ 10,575,372. including grants of \$ 19,167.) (Revenue \$ 14,813,957.)

THE SARASOTA MILITARY ACADEMY (SMA) OFFERS A VAST ARRAY OF EXCITING, HIGH INTEREST, AND IN-DEPTH COURSE OFFERINGS (MAJORS). ALL COURSES ARE DESIGNED TO MEET AND EXCEED DISTRICT AND SUNSHINE STATE STANDARDS AND TO LAUNCH STUDENTS ON A PATH TO FUTURE SUCCESS. OUR GRADUATES ARE WELL PREPARED FOR COLLEGE, MILITARY SERVICE, OR THEIR CHOSEN CAREER FIELD. WE ARE PROUD TO OUTLINE THE "MAJOR OPPORTUNITIES" OFFERED TO SMA CADETS.

SMALL CLASS SIZES, INDIVIDUALIZED INSTRUCTION, STRUCTURE, DISCIPLINE, STRINGENTLY ENFORCED DRESS CODES, AND RESPECT IN THE CLASSROOM HELP TO ENSURE A UNIQUE, HIGH QUALITY INSTRUCTIONAL PROGRAM. WE HAVE NO ENTRANCE REQUIREMENTS, BUT WE DO HAVE HIGH EXPECTATIONS FOR OUR CADETS

4b (Code:) (Expenses \$ including grants of \$) (Revenue \$)**4c** (Code:) (Expenses \$ including grants of \$) (Revenue \$)**4d** Other program services (Describe in Schedule O.)

(Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses 10,575,372.

Form 990 (2017)

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors?	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV		X
10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V		X
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI	X	
b Did the organization report an amount for investments - other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII		X
c Did the organization report an amount for investments - program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII		X
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX	X	
e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	X	
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III		X

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Part IV Checklist of Required Schedules (continued)

	Yes	No
20a Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H		X
20b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II	X	
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III		X
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J		X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a	X	
24b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		X
24c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		X
24d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		X
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I		X
25b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I		X
26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If "Yes," complete Schedule L, Part II		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part III		X
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
28a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV		X
28b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV		X
28c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV		X
29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I		X
34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1	X	
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
35b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2		
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2		X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI		X
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19?	X	

Note. All Form 990 filers are required to complete Schedule O

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Part V Statements Regarding Other IRS Filings and Tax ComplianceCheck if Schedule O contains a response or note to any line in this Part V ☐

		Yes	No
1a Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable	1a 3		
b Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable	1b 0		
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c	X	
2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a 252		
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)	2b	X	
3a Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a		X
b If "Yes," has it filed a Form 990-T for this year? If "No," to line 3b, provide an explanation in Schedule O	3b		
4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a		X
b If "Yes," enter the name of the foreign country: See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).			
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a		X
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b		X
c If "Yes," to line 5a or 5b, did the organization file Form 8886-T?	5c		
6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	6a		X
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b		
7 Organizations that may receive deductible contributions under section 170(c).			
a Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a		X
b If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b		
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c		X
d If "Yes," indicate the number of Forms 8282 filed during the year	7d		
e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e		X
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f		X
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g		
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h		
8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	8		
9 Sponsoring organizations maintaining donor advised funds.			
a Did the sponsoring organization make any taxable distributions under section 4966?	9a		
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b		
10 Section 501(c)(7) organizations. Enter:			
a Initiation fees and capital contributions included on Part VIII, line 12	10a		
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b		
11 Section 501(c)(12) organizations. Enter:			
a Gross income from members or shareholders	11a		
b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b		
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a		
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b		
13 Section 501(c)(29) qualified nonprofit health insurance issuers.			
a Is the organization licensed to issue qualified health plans in more than one state? Note. See the instructions for additional information the organization must report on Schedule O.	13a		
b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b		
c Enter the amount of reserves on hand	13c		
14a Did the organization receive any payments for indoor tanning services during the tax year?	14a		X
b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O	14b		

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Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI

☒**Section A. Governing Body and Management**

	1a	1b	2	3	4	5	6	7a	7b	8a	8b	9	Yes	No
1a Enter the number of voting members of the governing body at the end of the tax year	9													
If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.														
b Enter the number of voting members included in line 1a, above, who are independent		9												
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?			2											X
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person?				3										X
4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?				4										X
5 Did the organization become aware during the year of a significant diversion of the organization's assets?				5										X
6 Did the organization have members or stockholders?				6										X
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?				7a										X
b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?				7b										X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:														
a The governing body?				8a		X								
b Each committee with authority to act on behalf of the governing body?				8b		X								
9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O				9										X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

	10a	10b	11a	11b	12a	12b	12c	13	14	15a	15b	16a	16b	Yes	No
10a Did the organization have local chapters, branches, or affiliates?	10a														X
b If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?		10b													
11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?			11a		X										
b Describe in Schedule O the process, if any, used by the organization to review this Form 990.															
12a Did the organization have a written conflict of interest policy? If "No," go to line 13					12a		X								
b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?					12b		X								
c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done					12c		X								
13 Did the organization have a written whistleblower policy?					13		X								
14 Did the organization have a written document retention and destruction policy?					14		X								
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?															
a The organization's CEO, Executive Director, or top management official					15a		X								
b Other officers or key employees of the organization					15b		X								
If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).															
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?					16a										X
b If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?					16b										

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed **FL**

18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
☒ Own website ☐ Another's website ☒ Upon request ☐ Other (explain in Schedule O)

19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

20 State the name, address, and telephone number of the person who possesses the organization's books and records: **STEVE KOK - (941) 926-1700**
801 NORTH ORANGE AVENUE, SARASOTA, FL 34236

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent ContractorsCheck if Schedule O contains a response or note to any line in this Part VII ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former** directors or trustees that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) MISS CARTER DONOVAN BOARD MEMBER	1.00	X						0.	0.	0.
(2) MS. LINDA LONG BOARD MEMBER	1.00	X						0.	0.	0.
(3) DR. T. LOGAN MALONE BOARD MEMBER	1.00	X						0.	0.	0.
(4) DR. THOMAS J. MCELHENY BOARD MEMBER	1.00	X						0.	0.	0.
(5) DR. ROBERT PARKINSON BOARD MEMBER	1.00	X						0.	0.	0.
(6) COL BEN KNISELY SECRETARY	2.00	X		X				0.	0.	0.
(7) MR. STEVE HERB VICE CHAIRMAN	2.00	X		X				0.	0.	0.
(8) MR. KIMBALL BOBBITT TREASURER	2.00	X		X				0.	0.	0.
(9) MR. HERB JONES CHAIRMAN	5.00	X		X				0.	0.	0.
(10) MS. CHRISTINA BOWMAN EXECUTIVE DIRECTOR	50.00			X				116,828.	0.	15,300.
(11) MICHAEL RYAN SR. ARMY INSTRUCTOR	50.00			X				99,994.	0.	8,962.
(12) ROBIN LIVINGSTON HEAD OF SCHOOL TO 2/9/18	50.00			X				97,870.	0.	13,848.
(13) STEPHEN KOK DIRECTOR OF FINANCE	50.00			X				104,473.	0.	17,002.
(14) FREDERICK FOUT HEAD OF SCHOOL - HS	50.00			X				0.	0.	0.
(15) TOM VARA HEAD OF SCHOOL - PREP	50.00			X				97,193.	0.	7,352.

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Part VIII Statement of RevenueCheck if Schedule O contains a response or note to any line in this Part VIII ☐

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
Contributions, Gifts, Grants and Other Similar Amounts	1 a Federated campaigns	1a					
	b Membership dues	1b					
	c Fundraising events	1c					
	d Related organizations	1d					
	e Government grants (contributions)	1e					
	f All other contributions, gifts, grants, and similar amounts not included above	1f	188,024.				
	g Noncash contributions included in lines 1a-1f: \$						
	h Total. Add lines 1a-1f			188,024.			
Program Service Revenue	2 a SCHOOL REVENUE	Business Code	611600	14,673,491.	14,673,491.		
	b						
	c						
	d						
	e						
	f All other program service revenue						
	g Total. Add lines 2a-2f			14,673,491.			
	3 Investment income (including dividends, interest, and other similar amounts)			1,603.			1,603.
4 Income from investment of tax-exempt bond proceeds							
5 Royalties							
Other Revenue	6 a Gross rents	(i) Real	(ii) Personal				
	b Less: rental expenses						
	c Rental income or (loss)						
	d Net rental income or (loss)						
	7 a Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other				
	b Less: cost or other basis and sales expenses						
	c Gain or (loss)						
	d Net gain or (loss)						
	8 a Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18	a					
	b Less: direct expenses	b					
	c Net income or (loss) from fundraising events						
	9 a Gross income from gaming activities. See Part IV, line 19	a					
	b Less: direct expenses	b					
	c Net income or (loss) from gaming activities						
	10 a Gross sales of inventory, less returns and allowances	a	4,914.				
	b Less: cost of goods sold	b	0.				
	c Net income or (loss) from sales of inventory			4,914.	4,914.		
	Miscellaneous Revenue			Business Code			
	11 a OTHER REVENUE		611600	135,552.	135,552.		
	b HURRICANE IRMA FUNDS		611600	41,903.			41,903.
c							
d All other revenue							
e Total. Add lines 11a-11d			177,455.				
12 Total revenue. See instructions.			15,045,487.	14,813,957.	0.	43,506.	

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	19,167.	19,167.		
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	574,295.		574,295.	
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	7,480,024.	6,463,882.	1,016,142.	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	559,967.	477,856.	82,111.	
9 Other employee benefits	705,879.	596,987.	108,892.	
10 Payroll taxes	605,254.	484,896.	120,358.	
11 Fees for services (non-employees):				
a Management				
b Legal	64,786.		64,786.	
c Accounting	60,624.		60,624.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)	707,717.	407,021.	300,696.	
12 Advertising and promotion				
13 Office expenses	231,848.	160,978.	70,870.	
14 Information technology	278,867.	263,169.	15,698.	
15 Royalties				
16 Occupancy	258,959.		258,959.	
17 Travel	16,574.	1,561.	15,013.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest	468,394.	457,926.	10,468.	
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	934,204.	769,792.	164,412.	
23 Insurance	242,686.	162.	242,524.	
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a SPORTS & RECREATION	240,214.	238,527.	1,687.	
b REPAIRS AND MAINTENANCE	221,659.	7,450.	214,209.	
c SCHOOL MATERIALS AND SUPPLIES	191,704.	15,492.	176,212.	
d TEXTBOOKS	123,454.	123,454.		
e All other expenses	375,227.	87,052.	288,175.	
25 Total functional expenses. Add lines 1 through 24e	14,361,503.	10,575,372.	3,786,131.	0.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

Check here ☐ if following SOP 98-2 (ASC 958-720)

Part X Balance SheetCheck if Schedule O contains a response or note to any line in this Part X ☐

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing	1,267,871.	1	1,448,111.
	2 Savings and temporary cash investments	74,600.	2	77,675.
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net	92,268.	4	140,247.
	5 Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instr). Complete Part II of Sch L		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges		9	
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 25,343,730.		
	b Less: accumulated depreciation	10b 4,956,917.	10c	20,386,813.
	11 Investments - publicly traded securities	126,910.	11	127,213.
	12 Investments - other securities. See Part IV, line 11		12	
	13 Investments - program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11	3,299,741.	15	3,564,327.
16 Total assets. Add lines 1 through 15 (must equal line 34)	25,003,345.	16	25,744,386.	
Liabilities	17 Accounts payable and accrued expenses	529,272.	17	736,070.
	18 Grants payable		18	
	19 Deferred revenue	0.	19	15,274.
	20 Tax-exempt bond liabilities	13,149,256.	20	12,669,223.
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		22	
	23 Secured mortgages and notes payable to unrelated third parties	338,326.	23	213,862.
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D	7,027,723.	25	7,766,980.
	26 Total liabilities. Add lines 17 through 25	21,044,577.	26	21,401,409.
	Net Assets or Fund Balances	Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.		
27 Unrestricted net assets		3,872,066.	27	4,256,066.
28 Temporarily restricted net assets		86,702.	28	86,911.
29 Permanently restricted net assets			29	
Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.				
30 Capital stock or trust principal, or current funds			30	
31 Paid-in or capital surplus, or land, building, or equipment fund			31	
32 Retained earnings, endowment, accumulated income, or other funds			32	
33 Total net assets or fund balances		3,958,768.	33	4,342,977.
34 Total liabilities and net assets/fund balances	25,003,345.	34	25,744,386.	

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Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI

☒

1	Total revenue (must equal Part VIII, column (A), line 12)	1	15,045,487.
2	Total expenses (must equal Part IX, column (A), line 25)	2	14,361,503.
3	Revenue less expenses. Subtract line 2 from line 1	3	683,984.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	3,958,768.
5	Net unrealized gains (losses) on investments	5	-1,110.
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	-298,665.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	4,342,977.

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII

☒

	Yes	No
1 Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.		
2a Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		X
b Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	X	
c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.	X	
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?		X
b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits		

Form 990 (2017)

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.
▶ Attach to Form 990 or Form 990-EZ.

▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2017

**Open to Public
Inspection**

Name of the organization

SARASOTA MILITARY ACADEMY, INC.

Employer identification number

65-1149763

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2 ☒ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990 or 990-EZ).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: _____
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: _____
- 10 ☐ An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
- a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
- b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
- c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
- d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
- e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.

f Enter the number of supported organizations

g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
Total						

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ. 732021 10-06-17 Schedule A (Form 990 or 990-EZ) 2017

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public support. Subtract line 5 from line 4.						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2017 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2016 Schedule A, Part II, line 14	15	%
16a 33 1/3% support test - 2017. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
b 33 1/3% support test - 2016. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
17a 10% -facts-and-circumstances test - 2017. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
b 10% -facts-and-circumstances test - 2016. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions <input type="checkbox"/>		

Schedule A (Form 990 or 990-EZ) 2017

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						
14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

15 Public support percentage for 2017 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2016 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2017 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2016 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests - 2017. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization ☐

b 33 1/3% support tests - 2016. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization ☐

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐

Part IV Supporting Organizations

(Complete only if you checked a box in line 12 on Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d of Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer (b) and (c) below.		
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in Part VI when and how the organization made the determination.		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.		
4a Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes," and if you checked 12a or 12b in Part I, answer (b) and (c) below.		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.		
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in Part VI , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).		
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI .		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).		
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in Part VI .		
b Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in Part VI .		
c Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI .		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer 10b below.		
b Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)		

Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?		
b A family member of a person described in (a) above?		
c A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI.		

Section B. Type I Supporting Organizations

	Yes	No
1 Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.		
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.		

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).		

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).		
3 By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.		

Section E. Type III Functionally Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).		
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.		
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.		
c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).		
2 Activities Test. Answer (a) and (b) below.		
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.		
b Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.		
3 Parent of Supported Organizations. Answer (a) and (b) below.		
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? Provide details in Part VI.		
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

- 1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (explain in Part VI.) See instructions. All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8	

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (explain in detail in Part VI):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d	3	
4	Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by .035	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	

Section C - Distributable Amount		Current Year	
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1	
2	Enter 85% of line 1	2	
3	Minimum asset amount for prior year (from Section B, line 8, Column A)	3	
4	Enter greater of line 2 or line 3	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

Schedule A (Form 990 or 990-EZ) 2017

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D - Distributions	Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	
4 Amounts paid to acquire exempt-use assets	
5 Qualified set-aside amounts (prior IRS approval required)	
6 Other distributions (describe in Part VI). See instructions.	
7 Total annual distributions. Add lines 1 through 6.	
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	
9 Distributable amount for 2017 from Section C, line 6	
10 Line 8 amount divided by line 9 amount	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2017	(iii) Distributable Amount for 2017
1 Distributable amount for 2017 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2017 (reasonable cause required- explain in Part VI). See instructions.			
3 Excess distributions carryover, if any, to 2017			
a			
b From 2013			
c From 2014			
d From 2015			
e From 2016			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2017 distributable amount			
i Carryover from 2012 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
4 Distributions for 2017 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2017 distributable amount			
c Remainder. Subtract lines 4a and 4b from 4.			
5 Remaining underdistributions for years prior to 2017, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions.			
6 Remaining underdistributions for 2017. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.			
7 Excess distributions carryover to 2018. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2013			
b Excess from 2014			
c Excess from 2015			
d Excess from 2016			
e Excess from 2017			

Schedule A (Form 990 or 990-EZ) 2017

Part VI

Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information.
(See instructions.)

DRAFT

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

- ▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2017

Name of the organization

SARASOTA MILITARY ACADEMY, INC.

Employer identification number

65-1149763

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☒ 501(c)(3) (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the **General Rule** and a **Special Rule**. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$

Caution: An organization that isn't covered by the **General Rule** and/or the **Special Rules** doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization	Employer identification number
SARASOTA MILITARY ACADEMY, INC.	65-1149763

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	BAYCROSS CHRISTIAN FAMILY FOUNDATION 3650 17TH STREET SARASOTA, FL 34235	\$ 60,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	NORMAN AND PHYLLIS SISKEL C/O COMMUNITY FOUNDATION SARASOTA 2635 FRUITVILLE ROAD SARASOTA, FL 34237	\$ 18,611.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	EDUCATION FOUNDATION OF SARASOTA COUNTY 1960 LANDINGS BLVD. STE 120 SARASOTA, FL 34231	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	ROTARY CLUB OF SARASOTA SOUTHSIDE P.O. BOX 5718 SARASOTA, FL 34277	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Employer identification number

65-1149763

Part II

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$ _____	_____

Name of organization	Employer identification number
SARASOTA MILITARY ACADEMY, INC.	65-1149763

Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this info. once.) ▶ \$

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

SCHEDULE D
(Form 990)Department of the Treasury
Internal Revenue Service**Supplemental Financial Statements**▶ Complete if the organization answered "Yes" on Form 990,
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
▶ Attach to Form 990.▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2017Open to Public
Inspection

Name of the organization

SARASOTA MILITARY ACADEMY, INC.

Employer identification number

65-1149763

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year)		
4 Aggregate value at end of year		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?		<input type="checkbox"/> Yes <input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?		<input type="checkbox"/> Yes <input type="checkbox"/> No

Part II Conservation Easements. Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

<input type="checkbox"/> Preservation of land for public use (e.g., recreation or education)	<input type="checkbox"/> Preservation of a historically important land area
<input type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of a certified historic structure
<input type="checkbox"/> Preservation of open space	

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶

4 Number of states where property subject to conservation easement is located ▶

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \$

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1	▶ \$
(ii) Assets included in Form 990, Part X	▶ \$

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items:

a Revenue included on Form 990, Part VIII, line 1	▶ \$
b Assets included in Form 990, Part X	▶ \$

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule D (Form 990) 2017

732051 10-09-17

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):

- a ☐ Public exhibition
 b ☐ Scholarly research
 c ☐ Preservation for future generations
 d ☐ Loan or exchange programs
 e ☐ Other _____

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

Part IV Escrow and Custodial Arrangements. Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII and complete the following table:

	Amount
c Beginning balance	1c
d Additions during the year	1d
e Distributions during the year	1e
f Ending balance	1f

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII ☐

Part V Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

- a Board designated or quasi-endowment ☐ %
 b Permanent endowment ☐ %
 c Temporarily restricted endowment ☐ %

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

	Yes	No
(i) unrelated organizations	3a(i)	
(ii) related organizations	3a(ii)	
b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R?	3b	

4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		8,398,300.		8,398,300.
b Buildings		13,676,183.	2,767,154.	10,909,029.
c Leasehold improvements				
d Equipment		3,269,247.	2,189,763.	1,079,484.
e Other				
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				20,386,813.

Schedule D (Form 990) 2017

Part VII Investments - Other Securities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.) ▶		

Part VIII Investments - Program Related.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.) ▶		

Part IX Other Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1) UTILITY DEPOSIT	50,000.
(2) DEFERRED OUTFLOWS RELATED TO PENSION	3,483,723.
(3) DUE FROM RELATED ORGANIZATION	30,604.
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.) ▶	3,564,327.

Part X Other Liabilities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) FUNDS HELD FOR THE BENEFIT OF	
(3) OTHERS	60,952.
(4) INTEREST RATE SWAP CONTRACT	252,844.
(5) COMPENSATED ABSENCES	18,307.
(6) NET PENSION LIABILITY	6,578,071.
(7) DEFERRED INFLOWS RELATED TO	
(8) PENSION	856,806.
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	7,766,980.

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII ☒

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements	1	15,278,893.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	-1,110.
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII.)	2d	234,516.
e	Add lines 2a through 2d	2e	233,406.
3	Subtract line 2e from line 1	3	15,045,487.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5	15,045,487.

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements	1	14,894,684.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII.)	2d	533,181.
e	Add lines 2a through 2d	2e	533,181.
3	Subtract line 2e from line 1	3	14,361,503.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5	14,361,503.

Part XIII Supplemental Information.

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

PART X, LINE 2:

THE CHARTER SCHOOL QUALIFIES AS A TAX-EXEMPT ORGANIZATION UNDER INTERNAL REVENUE CODE SECTION 501(C)(3). THE CHARTER SCHOOL'S STATUS AS A TAX EXEMPT NOT-FOR-PROFIT ENTITY IS CONSIDERED A TAX POSITION SUBJECT TO REPORTING REQUIREMENTS UNDER FASB ACCOUNTING STANDARDS CODIFICATION 740-10. ENTITIES ARE REQUIRED TO EXAMINE ALL TAX POSITIONS AND DETERMINE IF IT IS MORE LIKELY THAN NOT THAT THE POSITIONS WOULD BE SUSTAINED UPON EXAMINATION BY TAXING AUTHORITIES. THE CHARTER SCHOOL HAS NOT RECORDED ANY ACCRUALS FOR UNCERTAIN INCOME TAX PROVISIONS AT JUNE 30, 2018.

PART XI, LINE 2D - OTHER ADJUSTMENTS:

CHANGE IN INTEREST RATE SWAP AGREEMENT 234,516.

Part XIII Supplemental Information (continued)

PART XII, LINE 2D - OTHER ADJUSTMENTS:

DEFERRED INFLOWS RELATED TO PENSIONS	533,181.
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DRAFT

SCHEDULE E
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Schools

- ▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 13, or Form 990-EZ, Part VI, line 48.**
▶ **Attach to Form 990 or Form 990-EZ.**
▶ **Go to www.irs.gov/Form990 for the latest information.**

OMB No. 1545-0047

2017

Open to Public Inspection

Name of the organization

SARASOTA MILITARY ACADEMY, INC.

Employer identification number

65-1149763

Part I

	YES	NO
1 Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?	X	
2 Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships?	X	
3 Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If "Yes," please describe. If "No," please explain. If you need more space, use Part II THE POLICY WAS PUBLISHED IN VARIOUS PERIODICALS AND OTHER PROMOTIONAL INFORMATION THAT WAS DISTRIBUTED THROUGHOUT THE COMMUNITY.	X	
4 Does the organization maintain the following?		
a Records indicating the racial composition of the student body, faculty, and administrative staff?	X	
b Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis?	X	
c Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?	X	
d Copies of all material used by the organization or on its behalf to solicit contributions?	X	
If you answered "No" to any of the above, please explain. If you need more space, use Part II.		
5 Does the organization discriminate by race in any way with respect to:		
a Students' rights or privileges?		X
b Admissions policies?		X
c Employment of faculty or administrative staff?		X
d Scholarships or other financial assistance?		X
e Educational policies?		X
f Use of facilities?		X
g Athletic programs?		X
h Other extracurricular activities?		X
If you answered "Yes" to any of the above, please explain. If you need more space, use Part II.		
6a Does the organization receive any financial aid or assistance from a governmental agency?	X	
b Has the organization's right to such aid ever been revoked or suspended?		X
If you answered "Yes" on either line 6a or line 6b, explain on Part II.		
7 Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If "No," explain on Part II	X	

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or Form 990-EZ.

Schedule E (Form 990 or 990-EZ) 2017

Part II **Supplemental Information.** Provide the explanations required by Part I, lines 3, 4d, 5h, 6b, and 7, as applicable.
Also provide any other additional information.**LINE 6 - EXPLANATION OF GOVERNMENT FINANCIAL AID:**

WE RECEIVE TAX REVENUE FROM THE STATE, THROUGH THE SCHOOL DISTRICT, BASED
ON NUMBER OF STUDENTS ENROLLED.

DRAFT

SCHEDULE I
(Form 990)

Department of the Treasury
Internal Revenue Service

**Grants and Other Assistance to Organizations,
Governments, and Individuals in the United States**
Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

▶ Attach to Form 990.

▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2017

Open to Public
Inspection

Name of the organization

SARASOTA MILITARY ACADEMY, INC.

Employer identification number

65-1149763

Part I General Information on Grants and Assistance

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

☒ Yes ☐ No

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
SARASOTA MILITARY ACADEMY FOUNDATION - 801 NORTH ORANGE AVE - SARASOTA, FL 34236	82-1047032	501(C)(3)	19,167.	0.			TO ASSIST WITH GENERAL OPERATING EXPENSES

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table 1.
3 Enter total number of other organizations listed in the line 1 table 0.

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule I (Form 990) (2017)

Part III**Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22.
Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance

Part IV**Supplemental Information.** Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

SCHEDULE K
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information on Tax-Exempt Bonds

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 24a. Provide descriptions, explanations, and any additional information in Part VI.
▶ Attach to Form 990. ▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2017
Open to Public
Inspection

Name of the organization

SARASOTA MILITARY ACADEMY, INC.

Employer identification number
65-1149763

Part I Bond Issues		SEE PART VI FOR COLUMNS (A) AND (F) CONTINUATIONS									
(a) Issuer name	(b) Issuer EIN	(c) CUSIP #	(d) Date issued	(e) Issue price	(f) Description of purpose	(g) Defeased		(h) On behalf of issuer		(i) Pooled financing	
						Yes	No	Yes	No	Yes	No
A SARASOTA COUNTY, FLORIDA	59-6000848	NONE	07/18/12	5,565,000.	REFINANCE CAPITAL BONDS	X		X			X
B SARASOTA COUNTY, FLORIDA	59-6000848	NONE	03/25/16	8,554,540.	PURCHASE OF LAND	X		X			X
C											
D											

Part II Proceeds									
		A		B		C		D	
1	Amount of bonds retired	144,000.		336,033.					
2	Amount of bonds legally defeased								
3	Total proceeds of issue	5,565,000.		7,604,540.					
4	Gross proceeds in reserve funds								
5	Capitalized interest from proceeds	751.							
6	Proceeds in refunding escrows								
7	Issuance costs from proceeds	110,000.		174,027.					
8	Credit enhancement from proceeds								
9	Working capital expenditures from proceeds								
10	Capital expenditures from proceeds			7,424,549.					
11	Other spent proceeds								
12	Other unspent proceeds			950,000.					
13	Year of substantial completion	2012							
14	Were the bonds issued as part of a current refunding issue?	Yes	No	Yes	No	Yes	No	Yes	No
15	Were the bonds issued as part of an advance refunding issue?		X		X				
16	Has the final allocation of proceeds been made?	X		X					
17	Does the organization maintain adequate books and records to support the final allocation of proceeds?	X		X					

Part III Private Business Use									
		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
1	Was the organization a partner in a partnership, or a member of an LLC, which owned property financed by tax-exempt bonds?		X		X				
2	Are there any lease arrangements that may result in private business use of bond-financed property?		X		X				

Part III Private Business Use (Continued)

	A		B		C		D	
	Yes	No	Yes	No	Yes	No	Yes	No
3a Are there any management or service contracts that may result in private business use of bond-financed property?		X		X				
b If "Yes" to line 3a, does the organization routinely engage bond counsel or other outside counsel to review any management or service contracts relating to the financed property?								
c Are there any research agreements that may result in private business use of bond-financed property?		X		X				
d If "Yes" to line 3c, does the organization routinely engage bond counsel or other outside counsel to review any research agreements relating to the financed property?								
4 Enter the percentage of financed property used in a private business use by entities other than a section 501(c)(3) organization or a state or local government		%		%		%		%
5 Enter the percentage of financed property used in a private business use as a result of unrelated trade or business activity carried on by your organization, another section 501(c)(3) organization, or a state or local government		%		%		%		%
6 Total of lines 4 and 5		%		%		%		%
7 Does the bond issue meet the private security or payment test?		X		X				
8a Has there been a sale or disposition of any of the bond-financed property to a non-governmental person other than a 501(c)(3) organization since the bonds were issued?		X		X				
b If "Yes" to line 8a, enter the percentage of bond-financed property sold or disposed of		%		%		%		%
c If "Yes" to line 8a, was any remedial action taken pursuant to Regulations sections 1.141-12 and 1.145-2?								
9 Has the organization established written procedures to ensure that all nonqualified bonds of the issue are remediated in accordance with the requirements under Regulations sections 1.141-12 and 1.145-2?		X		X				

Part IV Arbitrage

	A		B		C		D	
	Yes	No	Yes	No	Yes	No	Yes	No
1 Has the issuer filed Form 8038-T, Arbitrage Rebate, Yield Reduction and Penalty in Lieu of Arbitrage Rebate?	X		X					
2 If "No" to line 1, did the following apply?								
a Rebate not due yet?								
b Exception to rebate?								
c No rebate due?								
If "Yes" to line 2c, provide in Part VI the date the rebate computation was performed								
3 Is the bond issue a variable rate issue?	X		X					
4a Has the organization or the governmental issuer entered into a qualified hedge with respect to the bond issue?		X		X				
b Name of provider								
c Term of hedge								
d Was the hedge superintegrated?								
e Was the hedge terminated?								

Part IV Arbitrage (Continued)

	A		B		C		D	
	Yes	No	Yes	No	Yes	No	Yes	No
5a Were gross proceeds invested in a guaranteed investment contract (GIC)?		X		X				
b Name of provider								
c Term of GIC								
d Was the regulatory safe harbor for establishing the fair market value of the GIC satisfied?								
6 Were any gross proceeds invested beyond an available temporary period?		X		X				
7 Has the organization established written procedures to monitor the requirements of section 148?	X		X					

Part V Procedures To Undertake Corrective Action

	A		B		C		D	
	Yes	No	Yes	No	Yes	No	Yes	No
Has the organization established written procedures to ensure that violations of federal tax requirements are timely identified and corrected through the voluntary closing agreement program if self-remediation isn't available under applicable regulations?		X		X				

Part VI Supplemental Information. Provide additional information for responses to questions on Schedule K. See instructions.**SCHEDULE K, PART I, BOND ISSUES:**

(A) ISSUER NAME: SARASOTA COUNTY, FLORIDA

(F) DESCRIPTION OF PURPOSE: REFINANCE CAPITAL BONDS

(A) ISSUER NAME: SARASOTA COUNTY, FLORIDA

(F) DESCRIPTION OF PURPOSE: PURCHASE OF LAND

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2017

Open to Public
Inspection

Name of the organization

SARASOTA MILITARY ACADEMY, INC.

Employer identification number
65-1149763

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

SARASOTA MILITARY ACADEMY IS A HIGH SCHOOL FOR GRADES 9-12 AND A MIDDLE SCHOOL FOR GRADES 6-8. IT IS A NOT-FOR-PROFIT ORGANIZATION THAT PROVIDES CLASSES MEETING THE FLORIDA STATE INSTRUCTIONAL CURRICULUM REQUIREMENTS FOR A HIGH SCHOOL AND INTERNATIONAL BACCALAUREATE DIPLOMA AND MIDDLE SCHOOL PROGRAM. ALL HIGH SCHOOL STUDENTS ARE REQUIRED TO ENROLL IN JROTC CLASSES AND WEAR THE U.S. ARMY UNIFORM. IN ADDITION TO OFFERING ALL STATE MANDATED COURSES, CLASSES IN FENCING, SELF-DEFENSE, SHOW CHORUS AND CHOIR ARE ALSO AVAILABLE. EXCEPTIONAL EDUCATIONAL CLASSES ARE OFFERED AS APPROPRIATE. PARTICIPATION IN EXTRACURRICULAR ACTIVITIES IS EXPECTED AND INCLUDE TEAMS IN DRILL, RIFLE MARKSMANSHIP AND RAIDERS. WE ARE ALSO A MEMBER OF THE FLORIDA HIGH SCHOOL ATHLETICS ASSOCIATION AND HAVE ACTIVITIES IN GOLF, LACROSSE, BASKETBALL, SAILING, SOCCER, AND WRESTLING. WE ARE AN ARMY CADET COMMAND 'HONOR UNIT WITH DISTINCTION', AND FULLY ACCREDITED WITH THE SOUTHERN ASSOCIATION OF COLLEGES AND SCHOOLS.

ALL MIDDLE SCHOOL STUDENTS ARE REQUIRED TO PARTICIPATE IN MILITARY STUDIES AND THE CHARACTER CLASSES IN THE ENTIRE PROGRAM ARE BASED ON THE INTERNATIONAL BACCALAUREATE MIDDLE YEARS PROGRAM. ALL STUDENTS ARE EXPECTED TO PARTICIPATE IN AN EXTRACURRICULAR ACTIVITY.

FORM 990, PART I, LINE 6 VOLUNTEERS

ASSIST IN SERVING LUNCH, CHAPERONE EVENTS, ADMINISTRATION, MENTOR CHILDREN, ORGANIZE SOCIAL EVENTS, TRANSPORTATION, NURSES OFFICE, AND

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990 or 990-EZ) (2017)

732211 09-07-17

Name of the organization

SARASOTA MILITARY ACADEMY, INC.

Employer identification number

65-1149763

ATHLETIC COACHES.

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

MULTI-CULTURAL AND GLOBALIZED WORLD.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS:

BOTH ACADEMICALLY AND BEHAVIORALLY. ADDITIONAL INFORMATION MAY BE
FOUND ON OUR WEBSITE AT: SARASOTAMILITARYACADEMY.ORG.

RECIPIENT OF THE UNITED STATES ARMY'S HIGHEST AWARD "HONOR UNIT WITH
DISTINCTION". FULLY ACCREDITED BY THE SOUTHERN ASSOCIATION OF COLLEGES
AND SCHOOLS. DRUG TESTING OF EVERY EMPLOYEE AND RANDOM DRUG TESTING OF
CADETS. A RECOGNIZED COMMUNITY LEADER FOR INVOLVEMENT IN VETERANS' DAY,
CIVIC EVENTS, BLOOD BANK CONTRIBUTIONS, LETTERS TO TROOPS, WREATHS
ACROSS AMERICA AND TOYS FOR TOTS. FAMILY ORIENTED WITH CONCERN FOR THE
SUCCESS OF EACH CADET.

JROTC ADVANCED SKILLS DEVELOPMENT AND LEADERSHIP - FOR STUDENTS WHO ARE
SERIOUS ABOUT JOINING THE MILITARY AND/OR GOING TO ONE OF THE SERVICE
ACADEMIES, STAFF TRAINING IS AVAILABLE. SINCE SMA IS A COLLEGE AND
CAREER PREPARATORY SCHOOL, MOST OF OUR STUDENTS (85%) GO ON TO COLLEGE
RATHER THAN THE MILITARY WITH A 95% GRADUATION RATE. PLEASE BE AWARE
THAT ALTHOUGH WE ARE A MILITARY ACADEMY, AND EVERYONE TAKES JROTC, THE
FOCUS IN THE PROGRAM IS ON DEVELOPING LEADERSHIP QUALITIES VIA THE
JROTC PROGRAM WITH THE END GOAL BEING TO HELP OUR STUDENTS BECOME
BETTER CITIZENS, LEADERS, AND TEAM PLAYERS IN THEIR CHOSEN PATH IN
LIFE.

Name of the organization

SARASOTA MILITARY ACADEMY, INC.

Employer identification number

65-1149763

SMA PREP PARTICIPATED IN THE VETERAN'S AND MEMORIAL DAY PARADES, WREATHS ACROSS AMERICA AND TOYS FOR TOTS. SMA PREP JOINED THE FLORIDA SUN COAST LEAGUE (FSCL) AND IS COMPETING WITH OTHER MEMBERS IN MANY SPORTS.

FORM 990, PART VI, SECTION B, LINE 11B:

THE 990 IS REVIEWED AND APPROVED AT A BOARD MEETING.

FORM 990, PART VI, SECTION B, LINE 12C:

ON AN ANNUAL BASIS OFFICERS, DIRECTORS, AND KEY EMPLOYEES ARE REQUIRED TO DISCLOSE CONFLICT OF INTERESTS. THESE CONFLICTS ARE MONITORED AND REVIEWED BY THE EXECUTIVE DIRECTOR OF SCHOOLS.

FORM 990, PART VI, SECTION B, LINE 15:

THE BOARD HAS HISTORICALLY DETERMINED FAIR MARKET PAY FOR KEY EMPLOYEES AND WILL CONTINUE TO DO SO IF SIGNIFICANT CHANGES ARE NECESSARY.

FORM 990, PART VI, SECTION C, LINE 19:

MEETINGS OF THE BOARD ARE POSTED ON THE SCHOOL'S WEBSITE, MARQUEE, MAIN OFFICES AND MESSAGED TO ALL FAMILIES. DURING THE MEETING, COPIES OF THE PREVIOUS MEETING MINUTES AND FINANCIAL STATEMENTS ARE AVAILABLE FOR VISITORS TO VIEW. THEY ARE ALSO AVAILABLE ON REQUEST OR ONLINE ON THE SCHOOL'S WEBSITE.

FORM 990, PART XI, LINE 9, CHANGES IN NET ASSETS:

CHANGE IN INTEREST RATE SWAP AGREEMENT 234,516.

DEFERRED OUTFLOWS/INFLOWS RELATED TO PENSIONS -533,181.

Name of the organization

SARASOTA MILITARY ACADEMY, INC.

Employer identification number

65-1149763

TOTAL TO FORM 990, PART XI, LINE 9

-298,665.

FORM 990, PART XII, LINE 2C AUDIT REVIEW PROCESS

THERE WERE NO CHANGES TO THE ENTITY'S AUDIT OVERSIGHT PROCESS DURING
THE TAX YEAR

DRAFT

SCHEDULE R
(Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

▶ Attach to Form 990.

▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2017

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Inspection

Name of the organization

SARASOTA MILITARY ACADEMY, INC.

Employer identification number
65-1149763

Part I Identification of Disregarded Entities. Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity

Part II Identification of Related Tax-Exempt Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
SARASOTA MILITARY ACADEMY FOUNDATION, INC., 82-1047032, 801 N. ORANGE AVE., SARASOTA, FL 34236	ACCEPT & ADMINISTER CONTRIBUTIONS FOR BENEFIT OF SARASOTA MILITARY	FLORIDA	501(C)(3)	LINE 12A, I			X

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

SEE PART VII FOR CONTINUATIONS

Schedule R (Form 990) 2017

Part V Transactions With Related Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.**Note:** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

	Yes	No
1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?		
a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity		X
b Gift, grant, or capital contribution to related organization(s)	X	
c Gift, grant, or capital contribution from related organization(s)		X
d Loans or loan guarantees to or for related organization(s)	X	
e Loans or loan guarantees by related organization(s)		X
f Dividends from related organization(s)		X
g Sale of assets to related organization(s)		X
h Purchase of assets from related organization(s)		X
i Exchange of assets with related organization(s)		X
j Lease of facilities, equipment, or other assets to related organization(s)		X
k Lease of facilities, equipment, or other assets from related organization(s)		X
l Performance of services or membership or fundraising solicitations for related organization(s)		X
m Performance of services or membership or fundraising solicitations by related organization(s)		X
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	X	
o Sharing of paid employees with related organization(s)	X	
p Reimbursement paid to related organization(s) for expenses	X	
q Reimbursement paid by related organization(s) for expenses		X
r Other transfer of cash or property to related organization(s)		X
s Other transfer of cash or property from related organization(s)		X

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1)			
(2)			
(3)			
(4)			
(5)			
(6)			

Part VII Supplemental Information.

Provide additional information for responses to questions on Schedule R. See instructions.

PART II, IDENTIFICATION OF RELATED TAX-EXEMPT ORGANIZATIONS:**NAME OF RELATED ORGANIZATION:**

SARASOTA MILITARY ACADEMY FOUNDATION, INC.

PRIMARY ACTIVITY: ACCEPT & ADMINISTER CONTRIBUTIONS FOR BENEFIT OF

SARASOTA MILITARY ACADEMY

DRAFT

**Application for Automatic Extension of Time To File an
Exempt Organization Return**

OMB No. 1545-1709

► **File a separate application for each return.**► **Information about Form 8868 and its instructions is at www.irs.gov/form8868.**

Electronic filing (e-file). You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile, click on Charities & Non-Profits, and click on e-file for Charities and Non-Profits.

Automatic 6-Month Extension of Time. Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Enter filer's identifying number

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions. SARASOTA MILITARY ACADEMY, INC.	Employer identification number (EIN) or 65-1149763
	Number, street, and room or suite no. If a P.O. box, see instructions. 801 NORTH ORANGE AVENUE	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. SARASOTA, FL 34236	

Enter the Return Code for the return that this application is for (file a separate application for each return) **01**

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

STEVE KOK

- The books are in the care of ► **801 NORTH ORANGE AVENUE - SARASOTA, FL 34236**

Telephone No. ► **(941) 926-1700**

Fax No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐
• If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ☐ . If this is for the whole group, check this box ☐ . If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 1** I request an automatic 6-month extension of time until **MAY 15, 2019**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

► ☐ calendar year _____ or► ☒ tax year beginning **JUL 1, 2017**, and ending **JUN 30, 2018**.

- 2** If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	0.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	0.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

Caution: If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA **For Privacy Act and Paperwork Reduction Act Notice, see instructions.**Form **8868** (Rev. 1-2017)

SMA PTCC Meeting Minutes February 12,2019

1800 meeting called to order

Minutes from December meeting was approved by all board members.

Cadet Christian Trujilla asked for a \$500.00 grant for basketball uniforms. The grant was motioned yea by Dori Zingmond and seconded by Maria Bankuty.

Cadet Caroline Bailey representing the Athletic Department asked for a \$500.00 grant for a gym mat with a school logo on it as you walk into the gym. The grant was motioned yea by Wendy Herschberger and seconded by Michele Collins.

Cadet Victoria Smith and Cadet Danielle Luce for SMA-CPT Goodman asked for a \$1000.00 grant for two 3D printers for Design Technology that is an IB credit course and counts as a college credit in the State of Florida. Grant was motioned yea by Dori Zingmond and seconded by Maria Bankuty. This was also approved by SMA-MAJ Kok.

SMA-MAJ Catena's mom presented a grant request for \$500.00 for teacher appreciation T-shirts. Every month teachers are picked by the students and given a T-shirt in appreciation for their contributions. The grant was motioned yea by Michele Collins and seconded by Maria Bankuty.

SMA-LTC Donehue requested a \$500.00 grant for International Heritage week. They will be having food for the different themes and need the money to help offset the cost. The kids can not afford to supply all the food needed for the celebration. The week will be celebrated 3/11-3/14. The grant was motioned yea by Wendy Herschberger and seconded by Maria Bankuty

Cadet Carlie Murphy with Ducks Unlimited asked for a \$500.00 grant for recycling projects and Duck Boxes. The grant was motioned yea by Dori Zingmond and seconded by Michele Collins.

Cadets Sam Varley and Allysa Villa-Mosqueda represented the wrestling team in requesting two \$500.00 grants to help offset travel expenses and help with the purchase of wrestling mats. The team is a year long season and can be expensive entering tournaments. The grant was motioned yea by Dori Zingmond and seconded by Maria Bankuty.

A grant was presented for the kitchen by Michele Collins, the burners in the kitchen all are not working and a new microwave is needed for the students at lunchtime to help reduce the line, giving the students more time to consume their lunch. These were presented as two separate grants of \$500.00 each. The grant was motioned yea by Wendy Herschberger and seconded by Dori Zingmond.

More hoodies are being ordered

Meeting adjourned at 1904

SMA Prep PTCC Read Ahead 14 March 2019

We are heading into the end of the school year quickly.

We will host a spring book fair which will be held the week of April 8th. We have worked with staff to request books of interest to our cadets. Specifically historical fiction and works by Alan Gratz.

We awarded a \$500 grant as start-up funds to an Archery Club that will be offered to Prep Cadets for the 2019-2020 school year. Major Alex Vanston will be sponsoring the club.

Chief Development Officer's Report

March 12, 2019

Agenda Items to Discuss

Updates

Strategic Plan:

- a. Grant Request with Gulf Coast Community Foundation
- b. Further Support from Community Foundation of Sarasota

Marketing & Development Plan

- a. 2019-2020 Goals
- b. Activity Report
- c. Goals
- d. Budget
- e. Engagement
 - Ambassador/Volunteer Luncheon
 - SMAF Gala
 - Les Stroud/Survivorman
 - Cash Bash
 - Giving Challenge
 - Annual Fund
 - Mailings
 - Summer Appeal
 - Back to School
 - End of Year Appeal
 - Newsletters
 - Legacy Alumni Bash

Sponsor Packages

- Needs of Each Group
- Naming Opportunity
 - Parking Spaces
 - Donor Board

Press Mentions Report

Press Releases Report